i2iTracks Version 7.2.0.1 Release Notes

i2iSystems
Creating Healthier Populations

3663 N. Laughlin Rd., Suite 200
Santa Rosa, CA 95403
866-820-2212
www.i2isys.com

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Table of Contents

Introduction 4

Patient Merge Enhancements 5

- New Merge Patient Screen 5
- Possible Duplicated Patients Tab 6
- Merge Patient Security 8

Referral Tracking Enhancements 9

- Letters and Email 9
  - Setting up Letters 9
  - Setting up Email 11
  - Generating Letters and Email 12
- Insurance Column on Patient Referral Manager Report 13
- Reassigning Referrals 14
- Assigned User and Specialty Report Criteria 15
- Locations and Approved Insurance Columns 16
- Referred To Column on Patient Info Screen 16
- Insurance ID on Patient Referral Screen 17
- Printing Provider NPI 18

Patient Search Enhancements 19

- New Medication Count Filter 19
- Number of Current Problems 21
- Number of Times Diagnosed 22
- Minimum Number of Procedure/Referrals 23
- Status and Status Notes Fields 25
- Cancel Patient Search 28
- Email Address Field 28
- New Appointment Fields 29
- Activate Patients 30
- Filter Tracking Type by Date 31
- Filter by Patient's Default Provider 32
- Report Selected Button 33

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Custom Report Writer Enhancements 34
New Report Design Tab 34
Print Design Layout 35
Patient Filter Selections 35
Data Mappings and Notes Columns 37
Five Levels of Report Items 37
Administrative Enhancements 37
Terminate i2iTracks Session 38
Report of Users and User Groups 38
Notification of Vitals Inactivity 39
Member Equivalent Value 40
Patient List Enhancements 44
Create Follow-Ups 44
Patient List Rights 46
Printing Enhancements 46
Contraindications 46
Print Patient Visit Summaries 46
Wide Reports 47
Other Enhancements 47
Procedure Name and Diagnosis Code 47
NPI on Provider Setup Screen 48
Patient Task Manager Sorting 49
LOINC Support 50
Follow-Up Manager 50
Lab Display Order 51
Provider Library 52
Gestational Age Calculation 52
Secondary Provider 54
Cell Phone Support 55
External Appointments Status 56
External Appointments Resource 56

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Introduction

This document contains information on the enhancements and changes to the following in i2iTracks Version 7.2.0.1:

- Patient Merge
- Referral Tracking
- Patient Search
- Custom Report Writer
- Administrative
- Patient List
- Printing
- Miscellaneous Features

This document describes the new and changed features and provides references to other i2i Systems documents you can refer to for more information.

How to Get There: Look for this icon and follow the path to quickly locate the new functionality.

For additional information on using:

- **i2iTracks**, see *i2iTracks User Manual* and the i2iTracks Online Help.
- **iPopulation Health Analytics**, see *i2iTracks Population Health Analytics (iPHA) Custom Reports & Graphs*.

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Patient Merge Enhancements

The following changes have been made to **Patient Merge**:

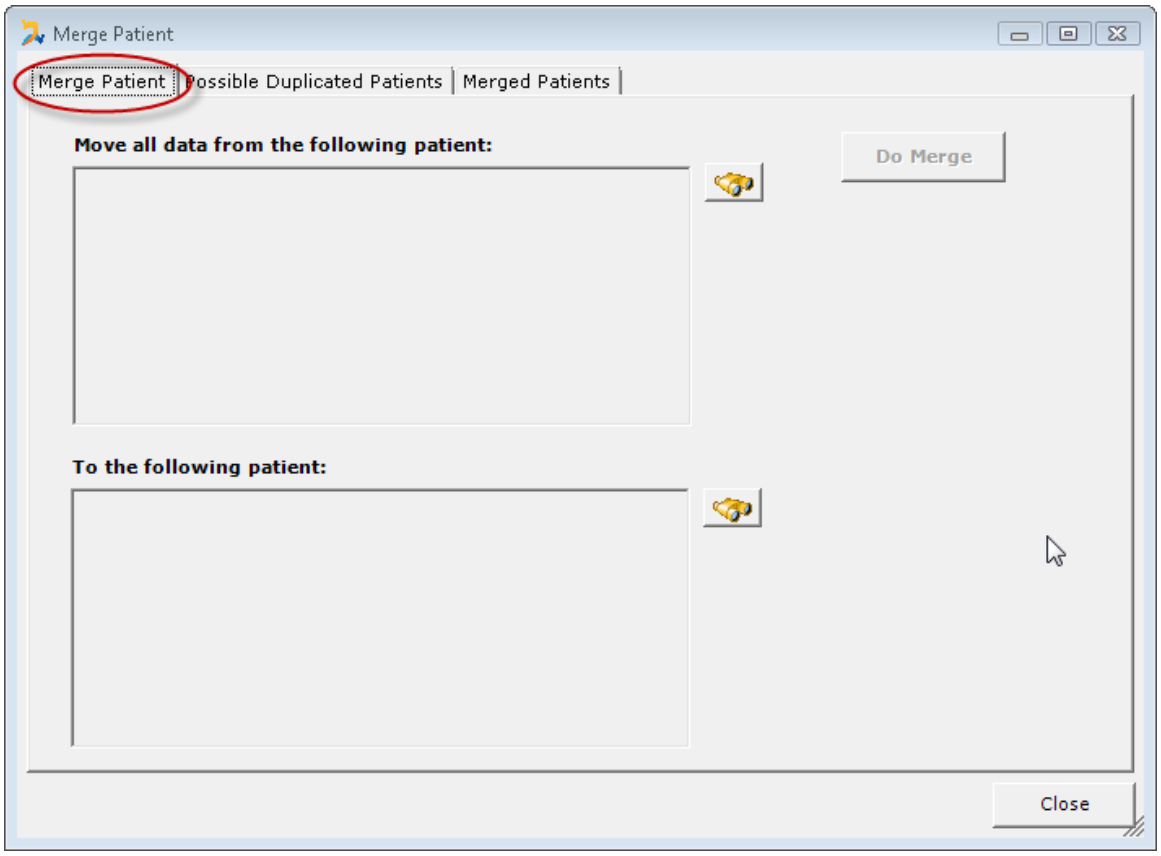
- New Patient Merge screen
- Possible Duplicated Patients added
- Patient Merge security added

New Merge Patient Screen

The **Merge Patient** and **Merged Patients Log** screens have been moved to a new **Merge Patient** screen that is located on the **Patients** menu. These features now appear as separate tabs on the new screen.

How to Get There:

Patients > Merge Patient



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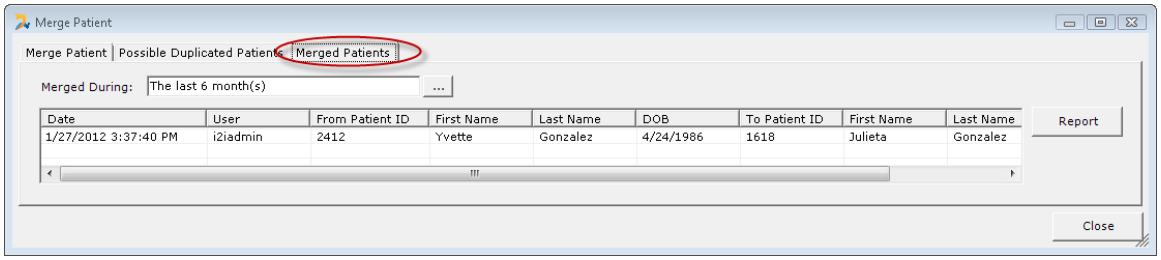
How to Get There:

Patients > Merge Patient > Merged Patients

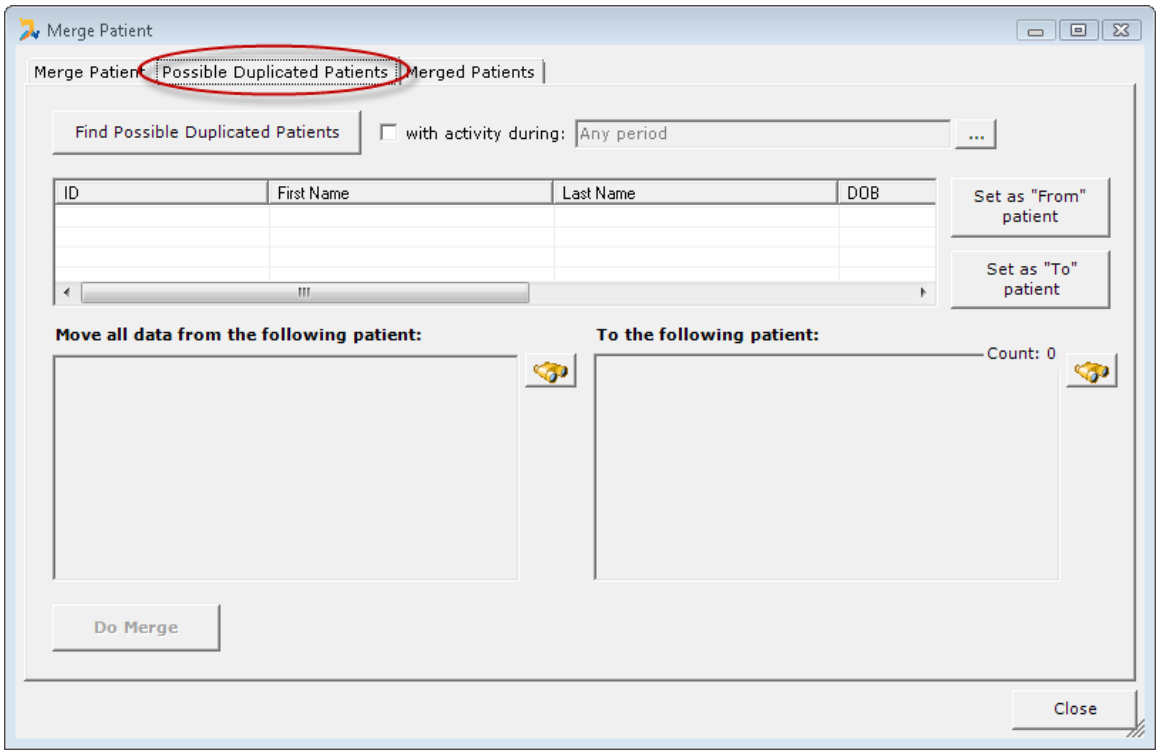


Possible Duplicated Patients Tab

There is a new **Possible Duplicated Patients** tab allowing you to view a list of the patients who are likely duplicates. You also have the option to merge these patients.

How to Get There:

Patients > Merge Patient > Possible Duplicated Patients



- Check the **with activity during** checkbox and enter a time period.

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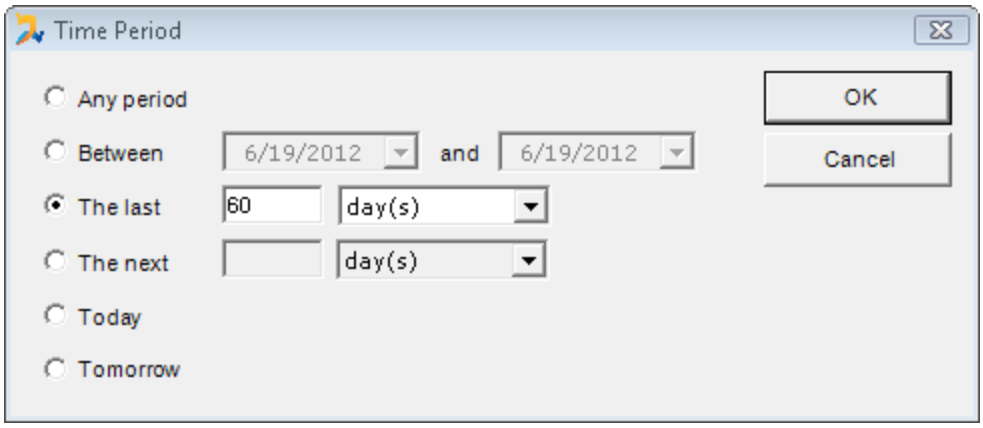
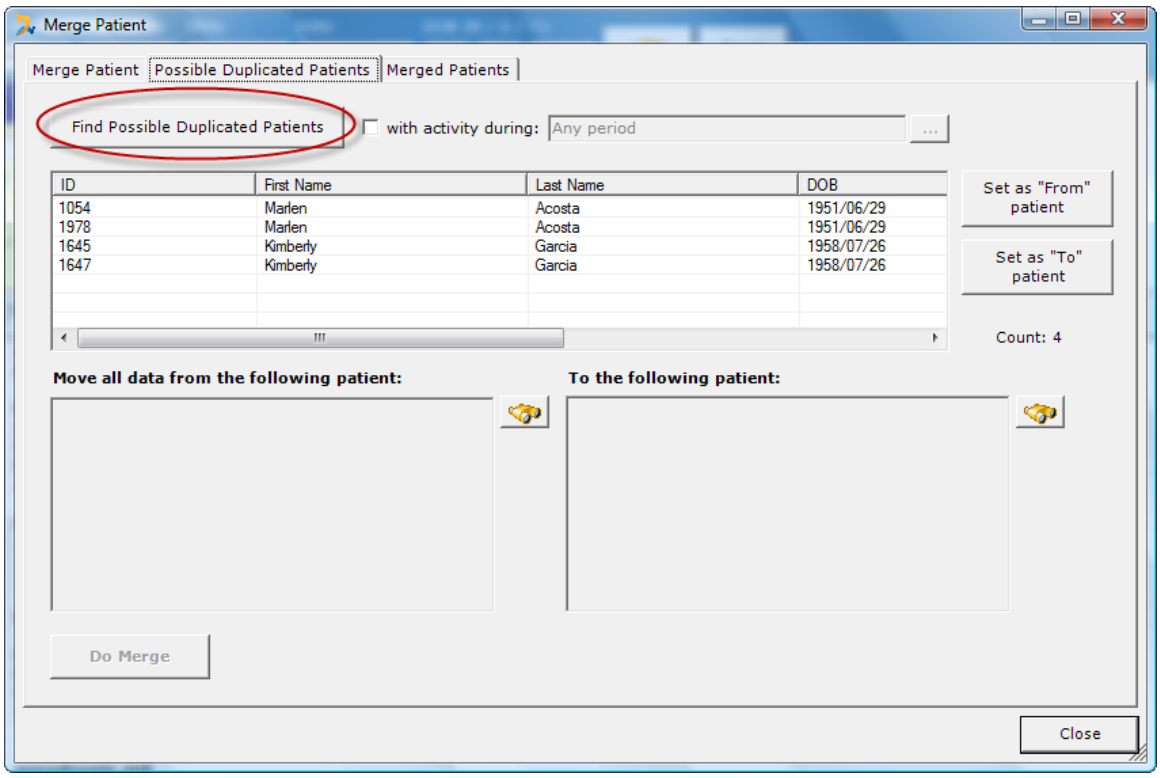


- Click **Find Possible Duplicated Patients**.



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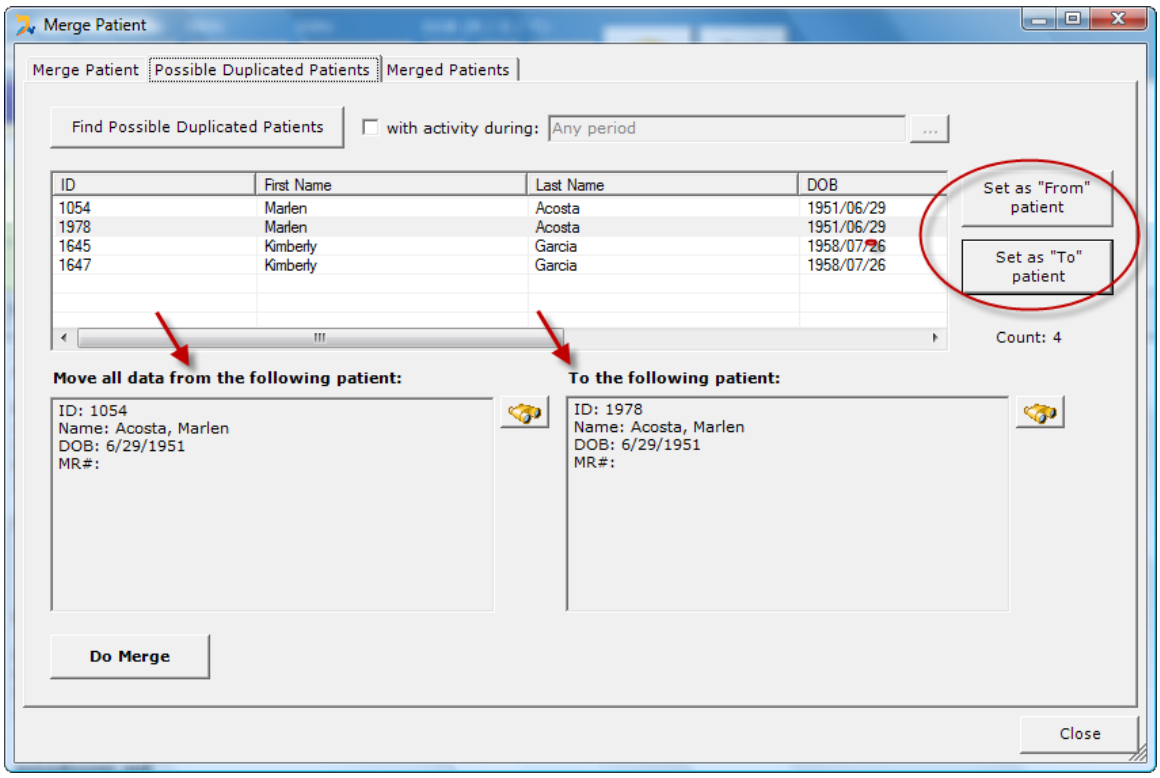

- Review the patient data.
- Select the patient you want to merge into another patient and click **Set as "From" patient**. Select the patient you want the patient to merge *into* and click **Set as "To" patient**.
- Click **Do Merge**. You are asked to confirm the merge, and then notified that the patients were successfully merged.

Merge Patient Security

To use the **Merge Patient** functionality on the **Patients** menu, you need the Merge Patient security right.

How to Get There:

File > Admin Tools > Security > User Groups

Security rights required to merge patients:

Item	No Access	Access
Patient Info		
Merge Patient	○	●

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Referral Tracking Enhancements

The following enhancements have been made to **Referral Tracking**:

- Printing letters from the **Referral Manager** screen
- Sending email from the **Referral Manager** screen
- **Insurance** column displayed on Patient Referrals report
- Reassign patient referrals to another user
- **Assigned User** and **Specialty** criteria on Referral Tracking Statistics report
- **Locations** and **Approved Insurance** columns displayed on Referral Source report
- **Referred To** column on **Patient Info** screen
- **Insurance ID** on **Patient Referral** screen
- Printing provider NPI

Letters and Email

In the **Referral Manager** screen, you can now print a letter or send an email for one or more referrals.

Setting up Letters

When defining a letter, you must now specify whether it is a Patient Letter or a Referral Letter. Referral Letters behave exactly like Patient Letters, except that Referral Letters allow you to include referral-specific fields.

How to Get There:

Setup > Correspondence > Letters

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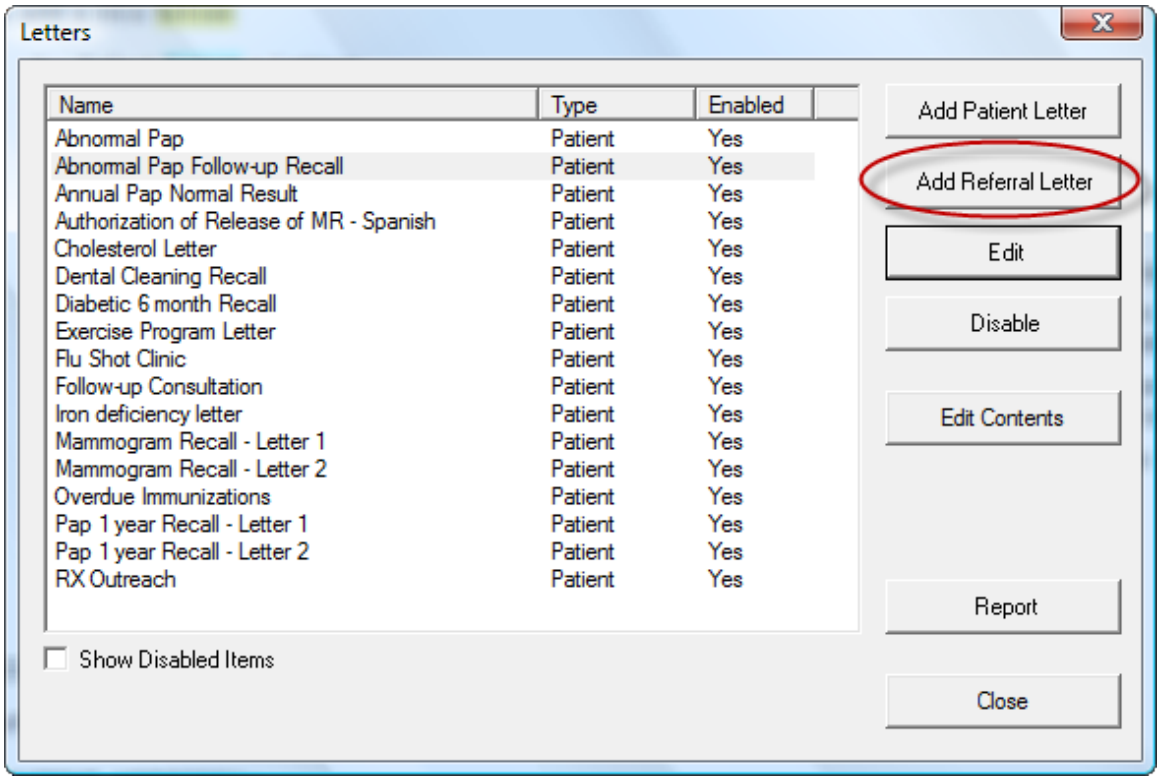
Letters
Name
Type
Enabled
Abnormal Pap Patient Yes
Abnormal Pap Follow-up Recall Patient Yes
Annual Pap Normal Result Patient Yes
Authorization of Release of MR - Spanish Patient Yes
Cholesterol Letter Patient Yes
Dental Cleaning Recall Patient Yes
Diabetic 6 month Recall Patient Yes
Exercise Program Letter Patient Yes
Flu Shot Clinic Patient Yes
Follow-up Consultation Patient Yes
Iron deficiency letter Patient Yes
Mammogram Recall - Letter 1 Patient Yes
Mammogram Recall - Letter 2 Patient Yes
Overdue Immunizations Patient Yes
Pap 1 year Recall - Letter 1 Patient Yes
Pap 1 year Recall - Letter 2 Patient Yes
RX Outreach Patient Yes
Show Disabled Items
Add Patient Letter
Add Referral Letter
Edit
Disable
Edit Contents
Report
Close

See an example referral letter below:

date <DATE>

Pt acct #: <PATIENT_ACCOUNT_NUM>
Patient Full Name: <PATIENT_FULL_NAME>
Patient Address: <PATIENT_ADDRESS1>
Patient City, State Zip: <PATIENT_CITY_STATE_ZIP>

Dear <PATIENT_FNAME>,

Here is your referral information:

Authorization #: <REFERRAL_AUTH_NO>
Referral Date: <REFERRAL_DATE_REFERRED>
Referral Ins: <REFERRAL_INSURANCE>
Ref last appt date and time: <REFERRAL_LAST_APPT_DATE_TIME>

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Ref Location: <REFERRAL_LOC_NAME>

Ref Address 1: <REFERRAL_LOC_ADDRESS1>

Ref Address 2: <REFERRAL_LOC_ADDRESS2>

Ref location city, state, zip: <REFERRAL_LOC_CITY_STATE_ZIP>

Ref By: <REFERRAL_REFERRED_BY>

Ref for: <REFERRAL_REFERRED_FOR>

Ref From: <REFERRAL_REFERRED_FROM>

Ref Source: <REFERRAL_SOURCE>

Ref Source Add 1: <REFERRAL_SOURCE_ADDRESS1>

Ref Source Add 2: <REFERRAL_SOURCE_ADDRESS2>

Ref Source City St zip: Add 1:<REFERRAL_SOURCE_CITY_STATE_ZIP>

Ref Source Phone 1: <REFERRAL_SOURCE_PHONE1>

Ref Source Phone 2: <REFERRAL_SOURCE_PHONE2>

Ref Specialty: <REFERRAL_SPECIALTY>

Ref Tracking #: <REFERRAL_TRACKING_NO>

Thank you.

Setting up Email

When setting up email templates, you must now select either **Patient Email Templates** or Referral Email Templates.

How to Get There:

Setup > Correspondence > E-Mail > Templates

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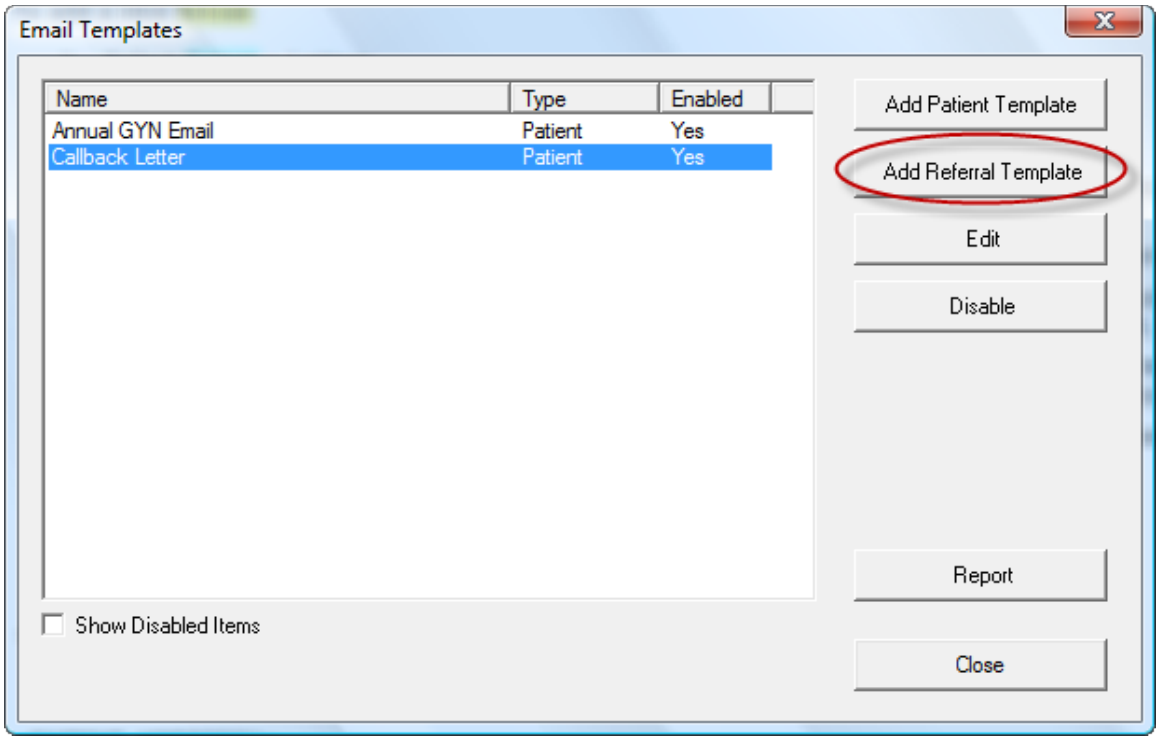

Generating Letters and Email

In the **Referral Manager** screen, you can now print a letter or send an email for one or more referrals. From the **Referrals** tab, select a patient or patients. Click **Print Letter** or **Send Email**.

How to Get There:

Patients > Manage Referrals > Referrals > Print Letter or Send Email

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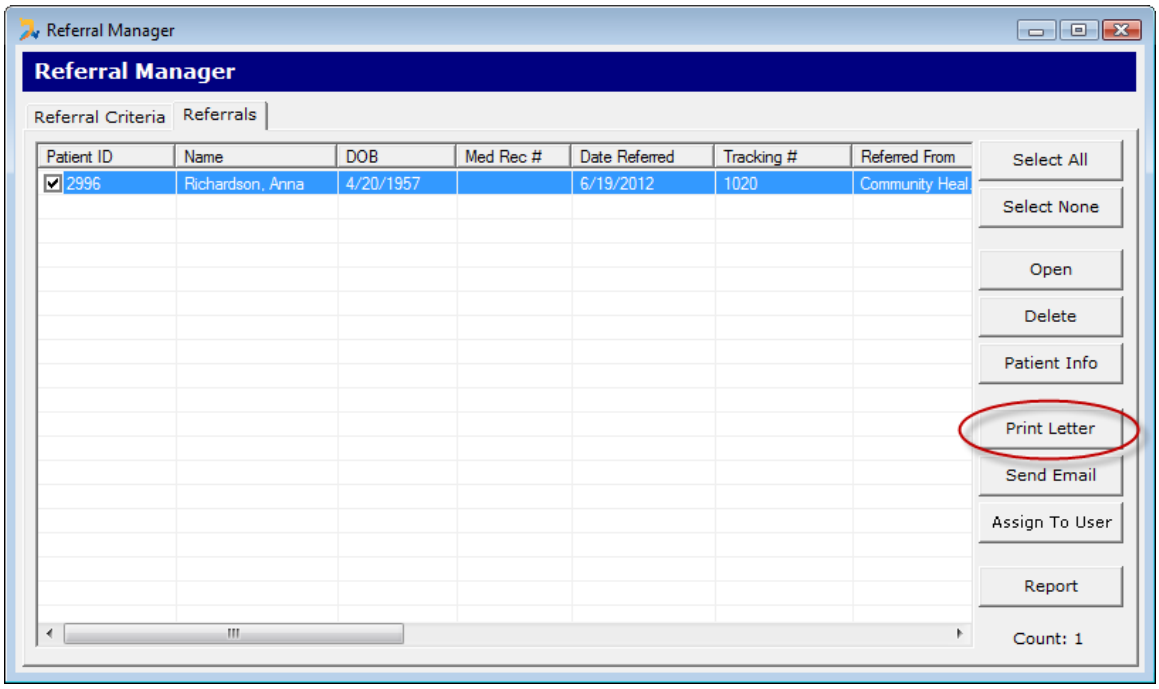

Insurance Column on Patient Referral Manager Report

When displaying a report of the Patient Referral Manager results, a column for **Insurance** is included.

How to Get There:

Patients > Manage Referrals > Referrals > Report

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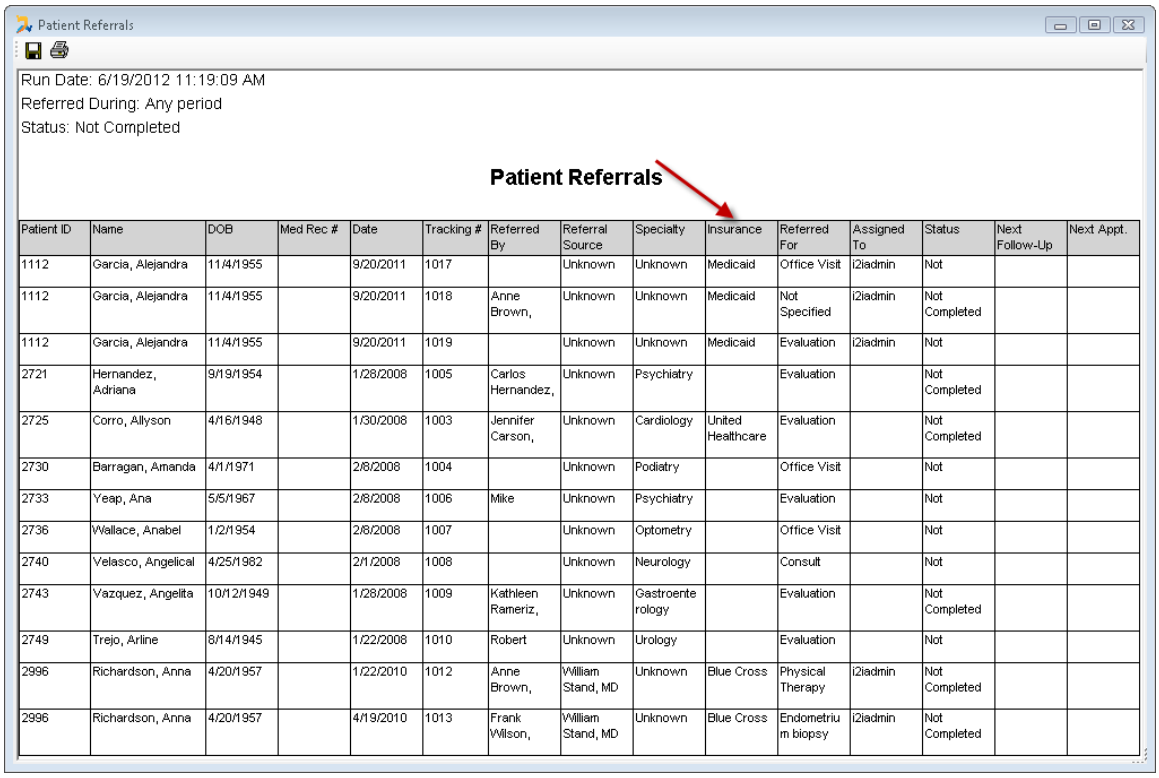


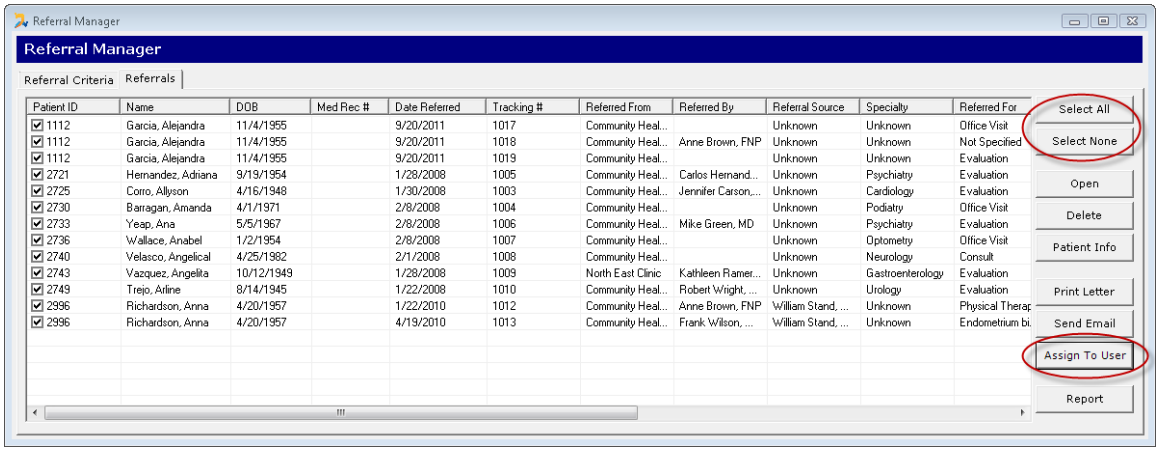
Patient ID	Name	DOB	Med Rec #	Date	Tracking #	Referred By	Referral Source	Specialty	Insurance	Referred For	Assigned To	Status	Next Follow-Up	Next Appt.
1112	Garcia, Alejandra	11/4/1955		9/20/2011	1017		Unknown	Unknown	Medicaid	Office Visit	i2iadmin	Not		
1112	Garcia, Alejandra	11/4/1955		9/20/2011	1018	Anne Brown,	Unknown	Unknown	Medicaid	Not Specified	i2iadmin	Not Completed		
1112	Garcia, Alejandra	11/4/1955		9/20/2011	1019		Unknown	Unknown	Medicaid	Evaluation	i2iadmin	Not		
2721	Hernandez, Adriana	9/19/1954		1/28/2008	1005	Carlos Hernandez,	Unknown	Psychiatry		Evaluation		Not Completed		
2725	Corro, Allyson	4/16/1948		1/30/2008	1003	Jennifer Carson,	Unknown	Cardiology	United Healthcare	Evaluation		Not Completed		
2730	Barragan, Amanda	4/1/1971		2/8/2008	1004		Unknown	Podiatry		Office Visit		Not		
2733	Yeap, Ana	5/5/1967		2/8/2008	1006	Mike	Unknown	Psychiatry		Evaluation		Not		
2736	Wallace, Anabel	1/2/1954		2/8/2008	1007		Unknown	Optometry		Office Visit		Not		
2740	Velasco, Angelical	4/25/1982		2/1/2008	1008		Unknown	Neurology		Consult		Not		
2743	Vazquez, Angelita	10/12/1949		1/28/2008	1009	Kathleen Rameriz,	Unknown	Gastroenterology		Evaluation		Not Completed		
2749	Trejo, Arline	8/14/1945		1/22/2008	1010	Robert	Unknown	Urology		Evaluation		Not		
2996	Richardson, Anna	4/20/1957		1/22/2010	1012	Anne Brown,	William Stand, MD	Unknown	Blue Cross	Physical Therapy	i2iadmin	Not Completed		
2996	Richardson, Anna	4/20/1957		4/19/2010	1013	Frank Wilson,	William Stand, MD	Unknown	Blue Cross	Endometrium biopsy	i2iadmin	Not Completed		

Reassigning Referrals

In the **Referral Manager** screen, you can now reassign referrals from one user to another using the **Assign To User** button. You may use **Select All** and **Select None** to more easily select referrals.

How to Get There:

Patients > Manage Referrals > Referrals > Assign to User



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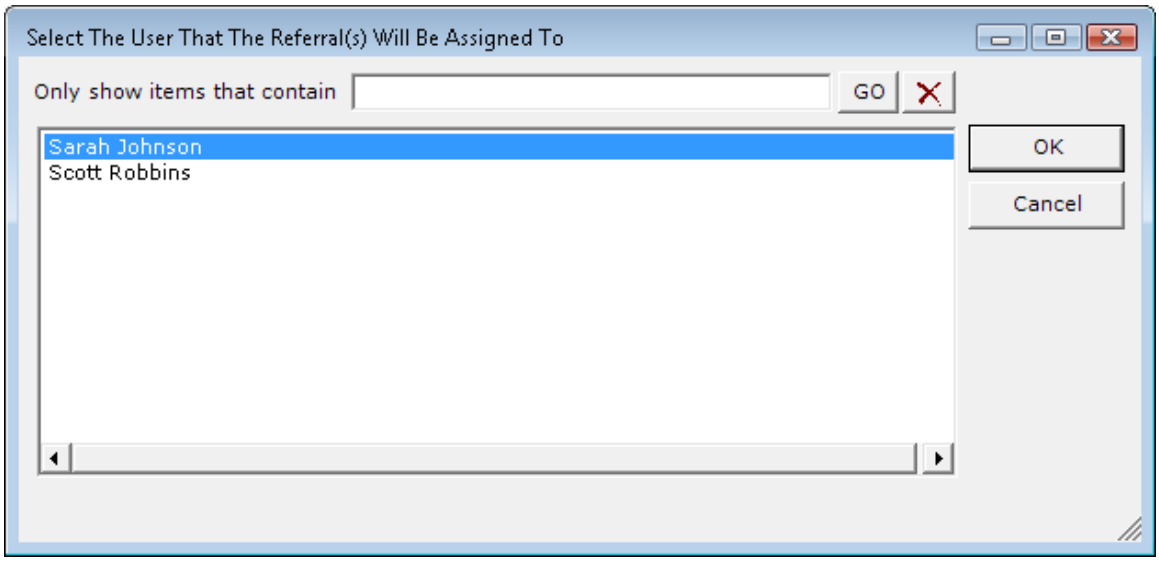

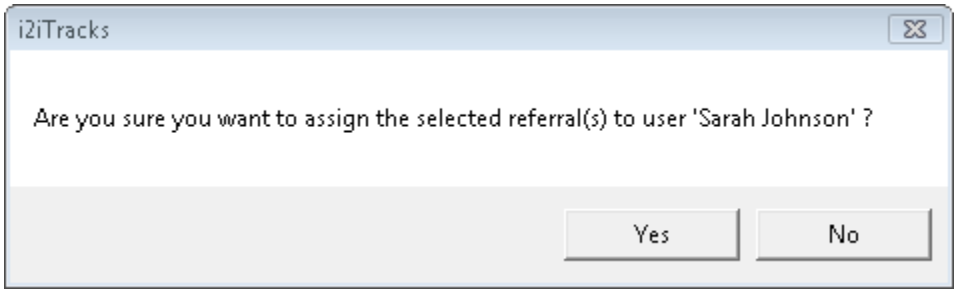

Assigned User and Specialty Report Criteria

Assigned to User and **Specialty** report criteria may now be specified for the Referral Tracking Statistics report.

How to Get There:

Reports > Referral Tracking Statistics

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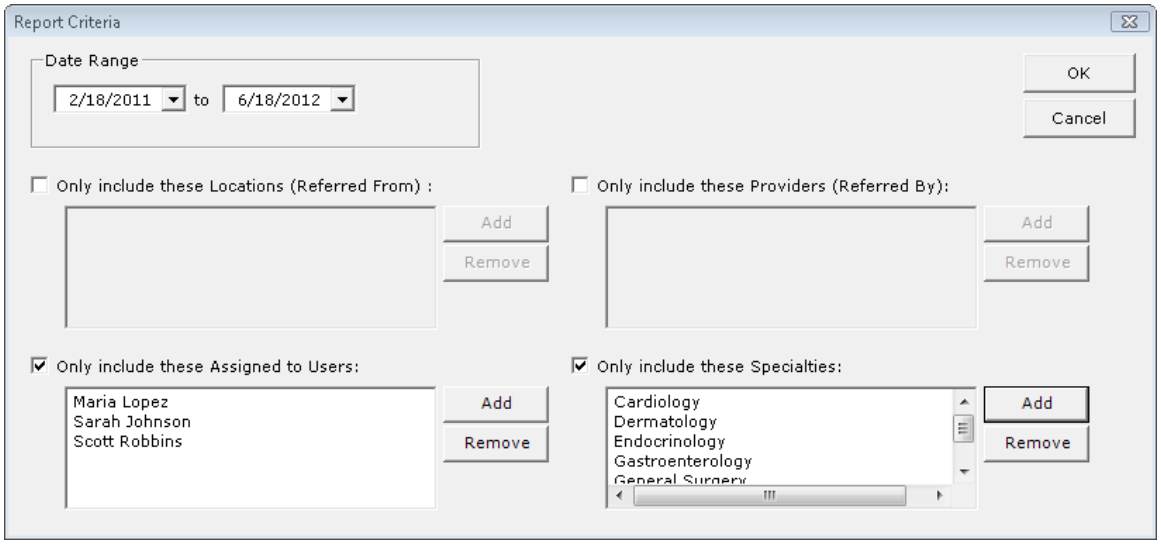
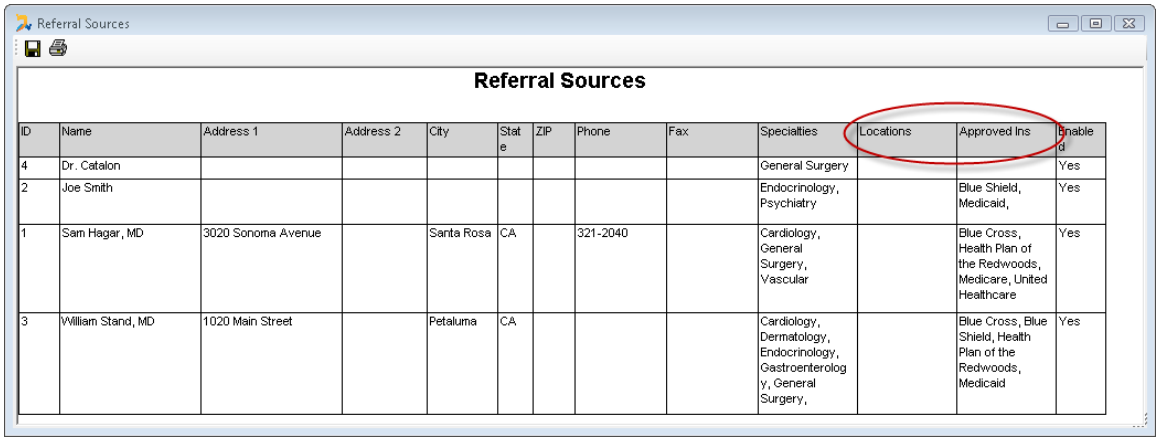


Locations and Approved Insurance Columns

In the **Referral Sources** screen, the report now includes columns for Locations and Approved Insurance Plans.

How to Get There:

Setup > Tracking > Referral Tracking > Referral Sources > Report



ID	Name	Address 1	Address 2	City	State	ZIP	Phone	Fax	Specialties	Locations	Approved Ins	Enabled
4	Dr. Catalon								General Surgery			Yes
2	Joe Smith								Endocrinology, Psychiatry		Blue Shield, Medicaid,	Yes
1	Sam Hagar, MD	3020 Sonoma Avenue		Santa Rosa	CA		321-2040		Cardiology, General Surgery, Vascular		Blue Cross, Health Plan of the Redwoods, Medicare, United Healthcare	Yes
3	William Stand, MD	1020 Main Street		Petaluma	CA				Cardiology, Dermatology, Endocrinology, Gastroenterology, General Surgery,		Blue Cross, Blue Shield, Health Plan of the Redwoods, Medicaid	Yes

Referred To Column on Patient Info Screen

There is now a **Referred To** column on the **Current** and **Past Referral** lists on the **Patient Info** screen

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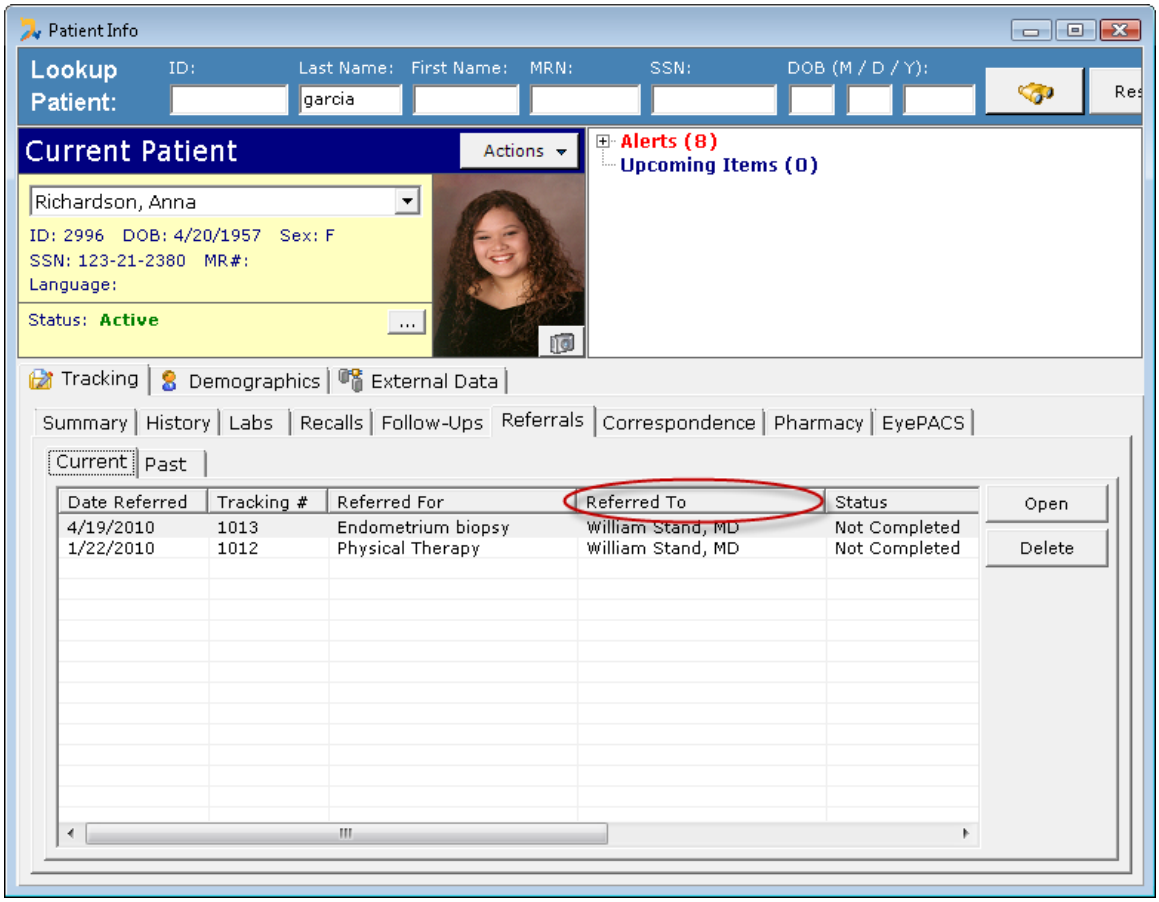
How to Get There:

Patient Info screen > Tracking > Referrals > Current or Past



Insurance ID on Patient Referral Screen

In the **Patient Referral** screen, you may now enter the **Insurance ID** in the **Insurance Authorization** section.

How to Get There:

Patient Info screen > Actions > Create Referral > Referral Type > Other Information

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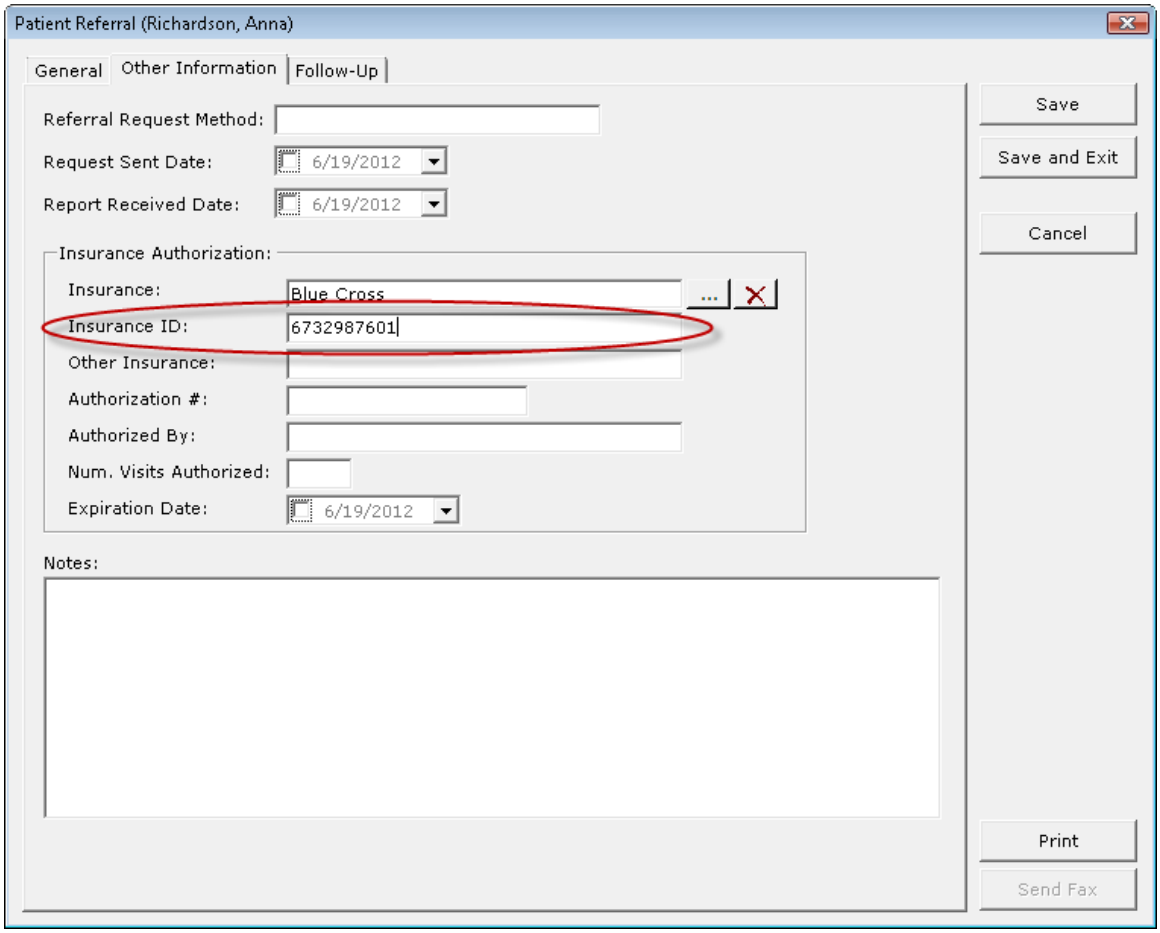

Printing Provider NPI

When printing a Patient Referral, the provider's NPI (National Provider Identifier) is now printed.

How to Get There:

(select patient) > Actions > Create Referral > Patient Referral > Print

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Date Printed: 6/19/2012
Patient ID: 2733
DOB: 5/5/1967
Med Rec #:
Language:

Yeap, Ana
1156 Baird Ave
Santa Rosa, CA 95403
707-526-7424

Patient Referral

Referral Information:
Date Referred: 2/8/2008
Tracking #: 1006
Referred For: Evaluation
CPTs:
ICD9s:
Priority: Routine
Reason:
Assigned To User: Sarah Johnson
Status: Not Completed
Request Method:
Request Sent:
Report Received:

Insurance:
Insurance Name:

Referred By:
Provider: Mike Green, MD
Location: Community Health Clinic of Santa Rosa
Address 1:
Address 2:
City:
State:
ZIP:
Phone:
Fax:
NPI: 1982788965

Referred To:
Source: Unknown
Specialty: Psychiatry

Patient Search Enhancements

The following enhancement and changes have been made to patient searches:

- New **Medication Count** filter
- **Problems (# of Current Problems)** filter
- **Problems (# of Times Diagnosed)** filter
- Minimum number of procedure/referrals
- **Status** and **Status Notes** fields
- Cancel patient searches
- New **Email Address** field
- New **Appointments** fields
- Activate inactive patients
- Filter tracking type by date
- Filter by patient's default provider
- Report on selected patients

New Medication Count Filter

The new Medication Count filter allows you to find patients who are taking at least "X " number of medications.

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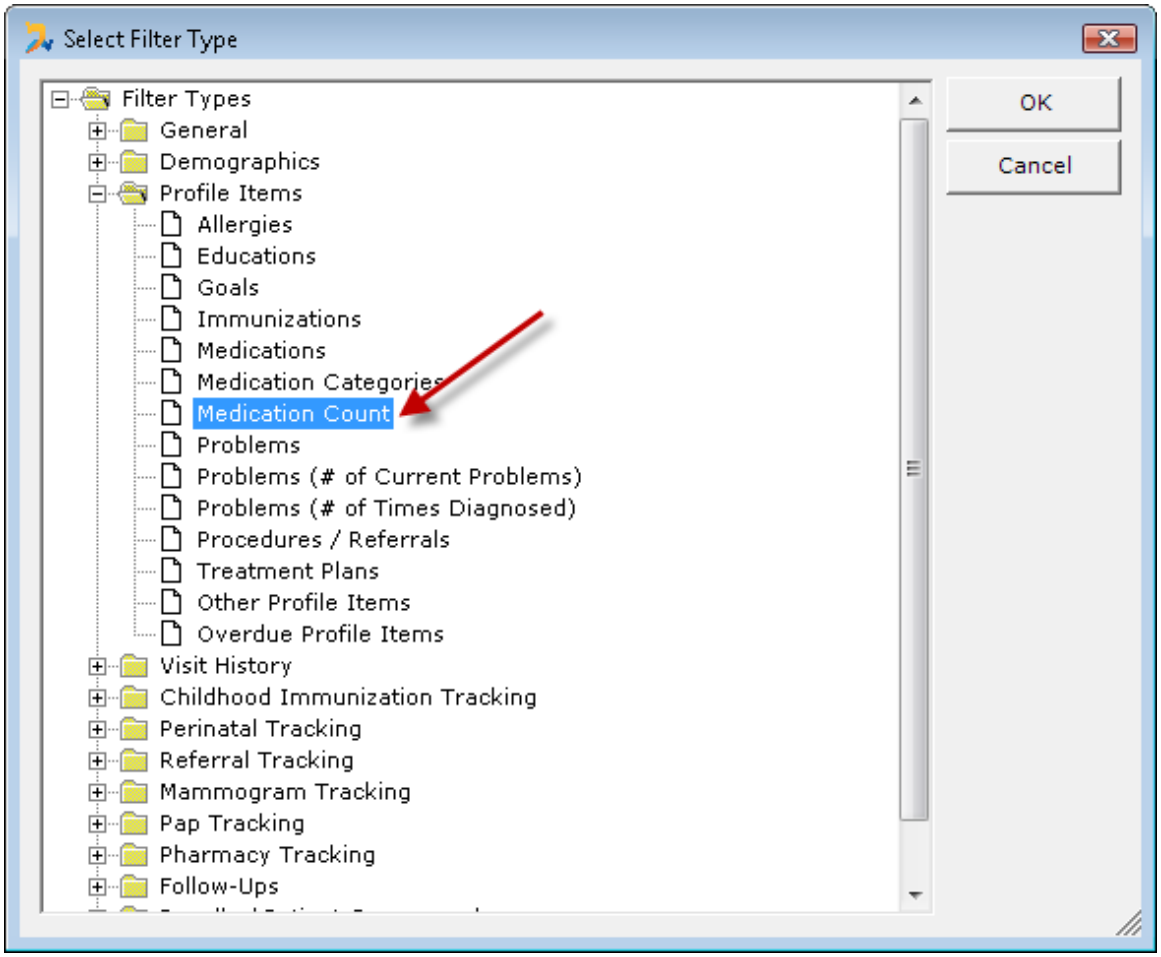
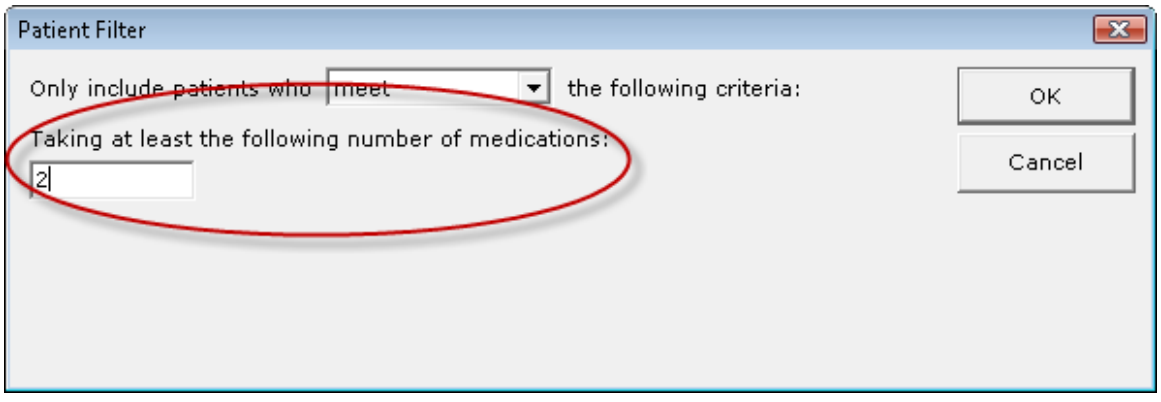
How to Get There:

Patient Search > (select search) Edit > Filters > Add > Profile Items > Medication Count





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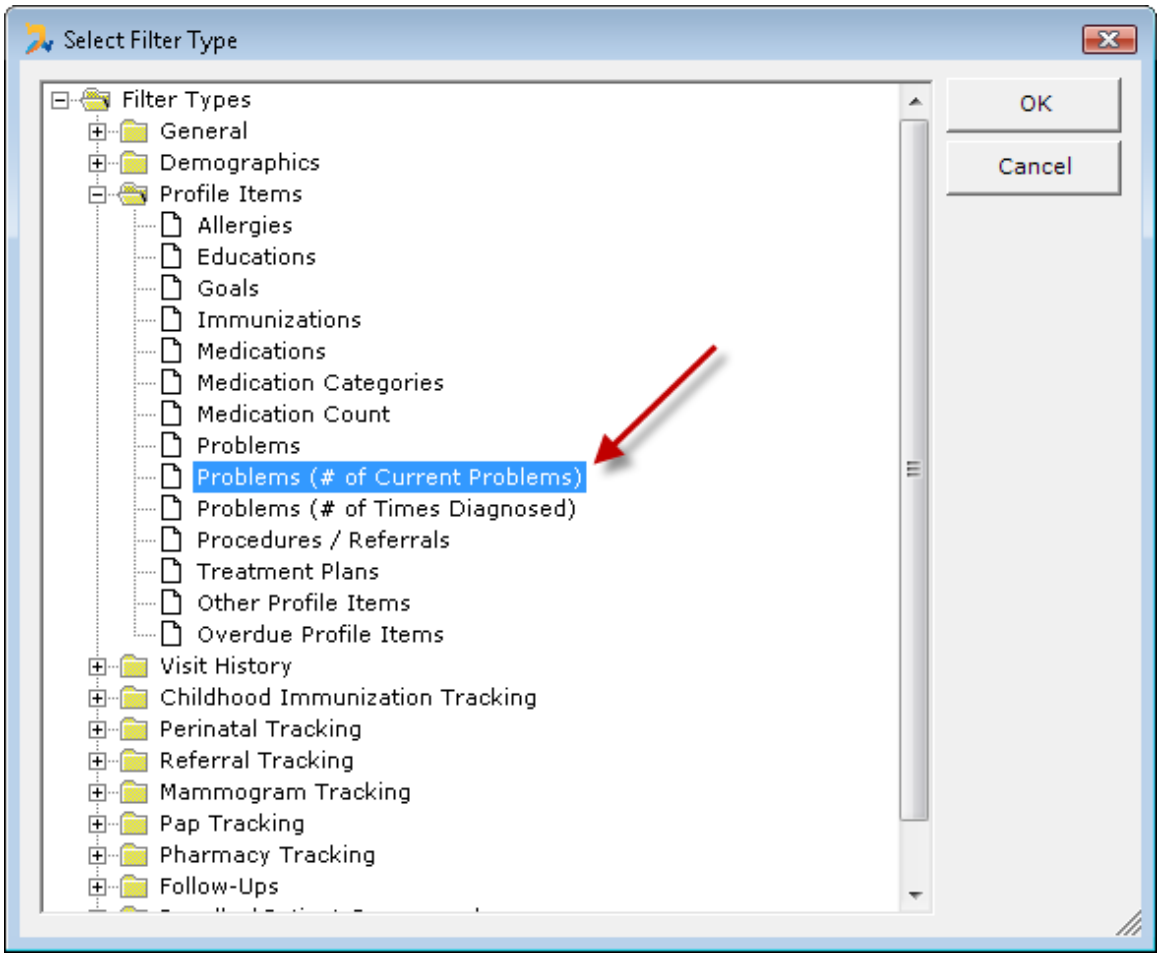
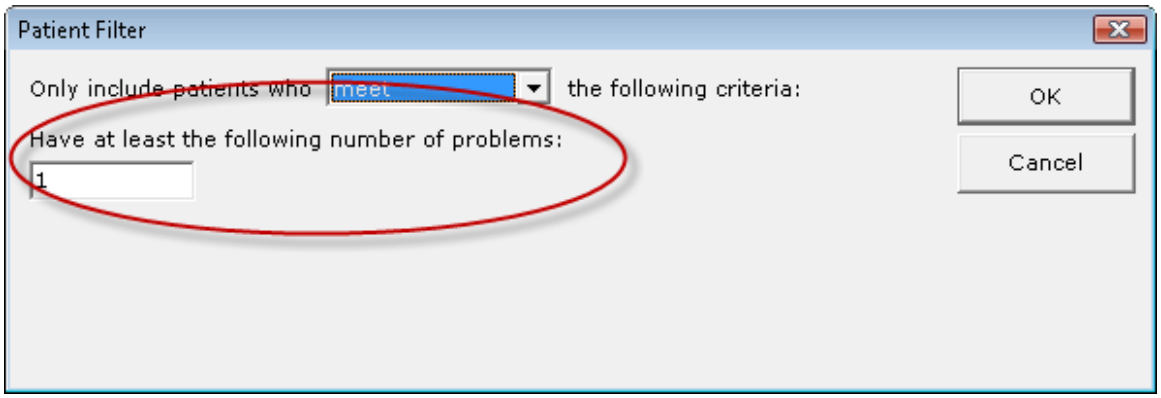
Number of Current Problems

A new **Problems (# of Current Problems)** filter allows you to find patients who have at least "X " number of problems.

How to Get There:

Patient Search > (select search) Edit > Filters > Add > Profile Items > Problems (#of Current Problems)





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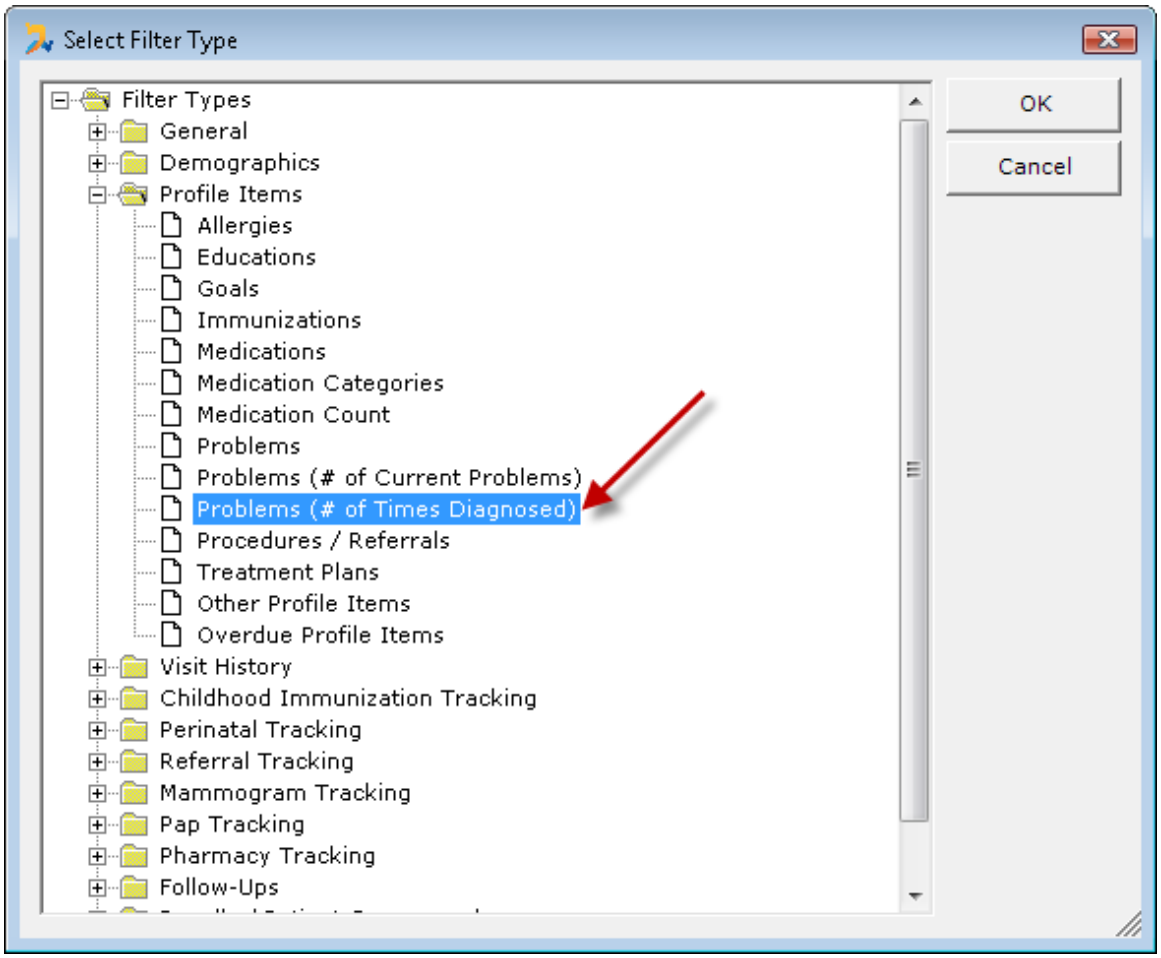
Number of Times Diagnosed

A new **Problems (# of Times Diagnosed)** filter allows you to find patients who have been diagnosed with a problem at least "X" number of times in the past.

How to Get There:

Patient Search > (select search) Edit > Filters > Add > Profile Items > Problems (# of Times Diagnosed)



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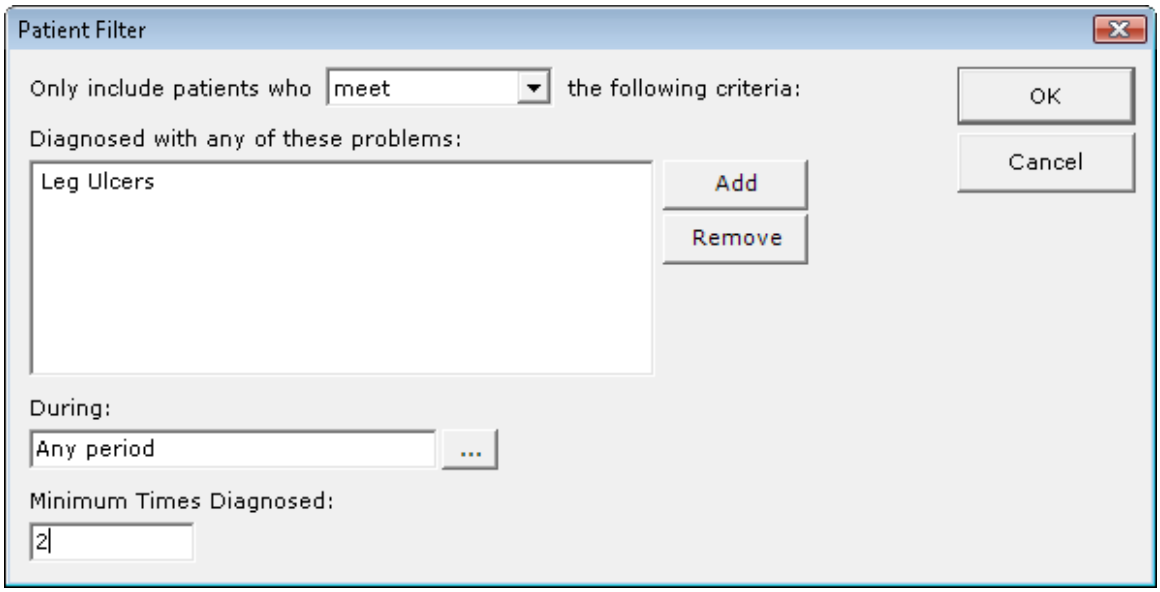

Minimum Number of Procedure/Referrals

When searching for patients who had a Procedure/Referral, you can now specify the minimum number of times it must have occurred. The dates the patient received each of the procedures/referrals are combined when determining the count.

How to Get There:

Patient Search > (select search) Edit > Filters > Add > Profile Items > Procedures/Referrals

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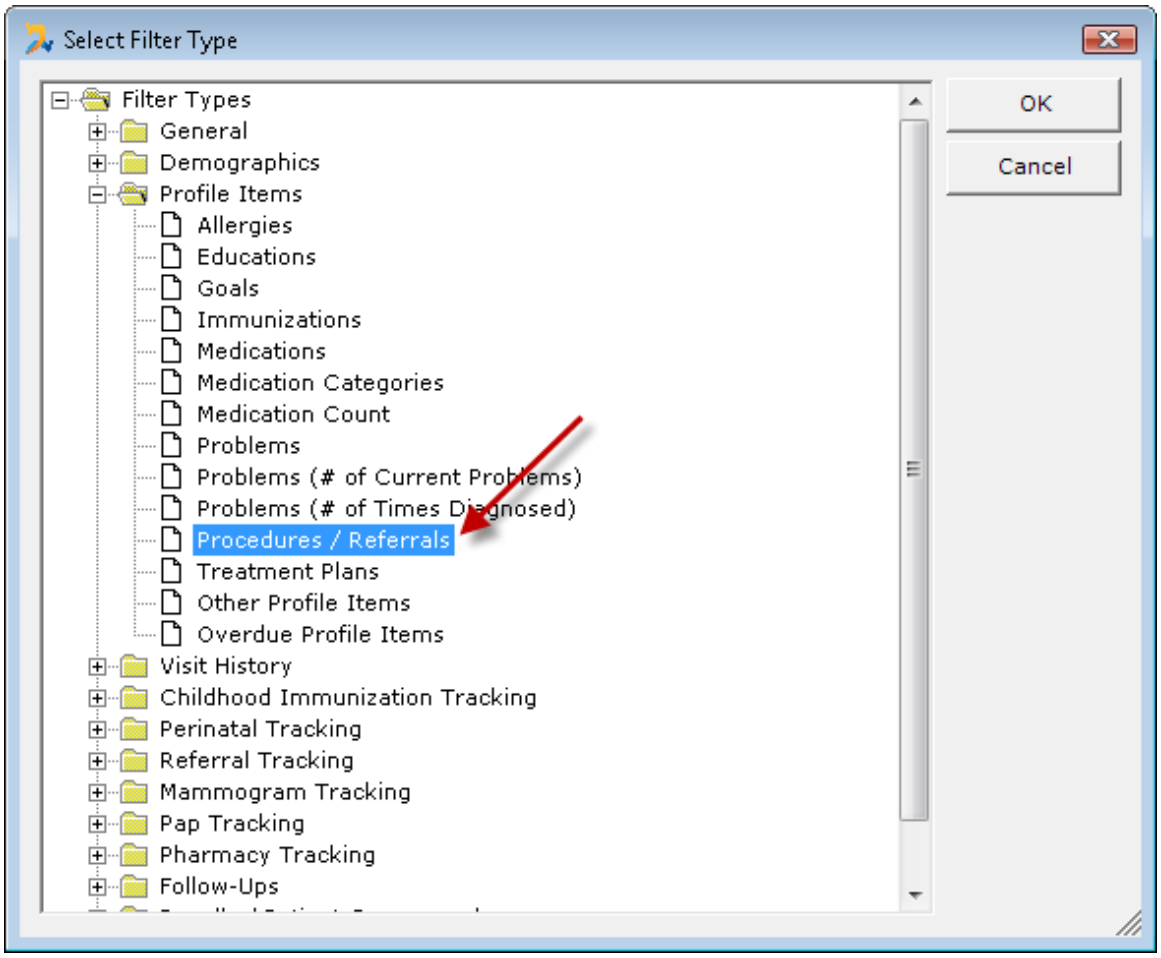

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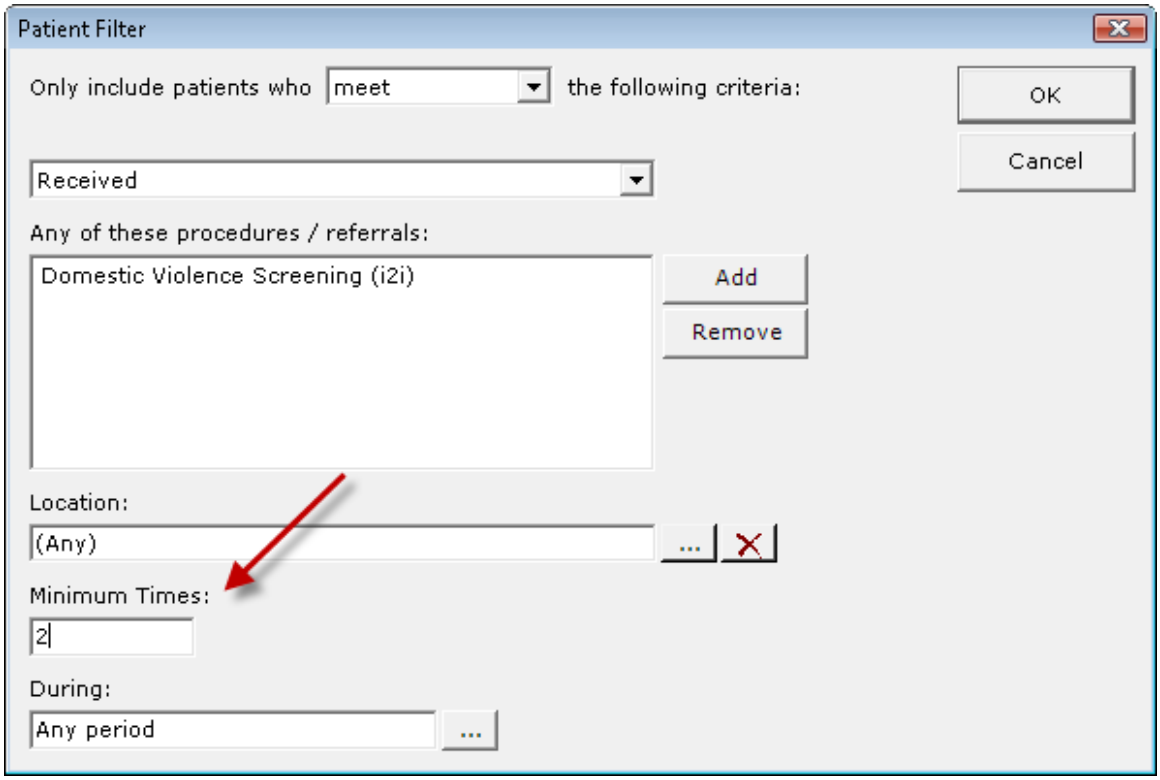

Status and Status Notes Fields

There are new search fields for patient **Status** and **Status Notes**.

How to Get There:

Patient Search > (select search) Edit > Fields > Show the Following Fields in the search results > Add

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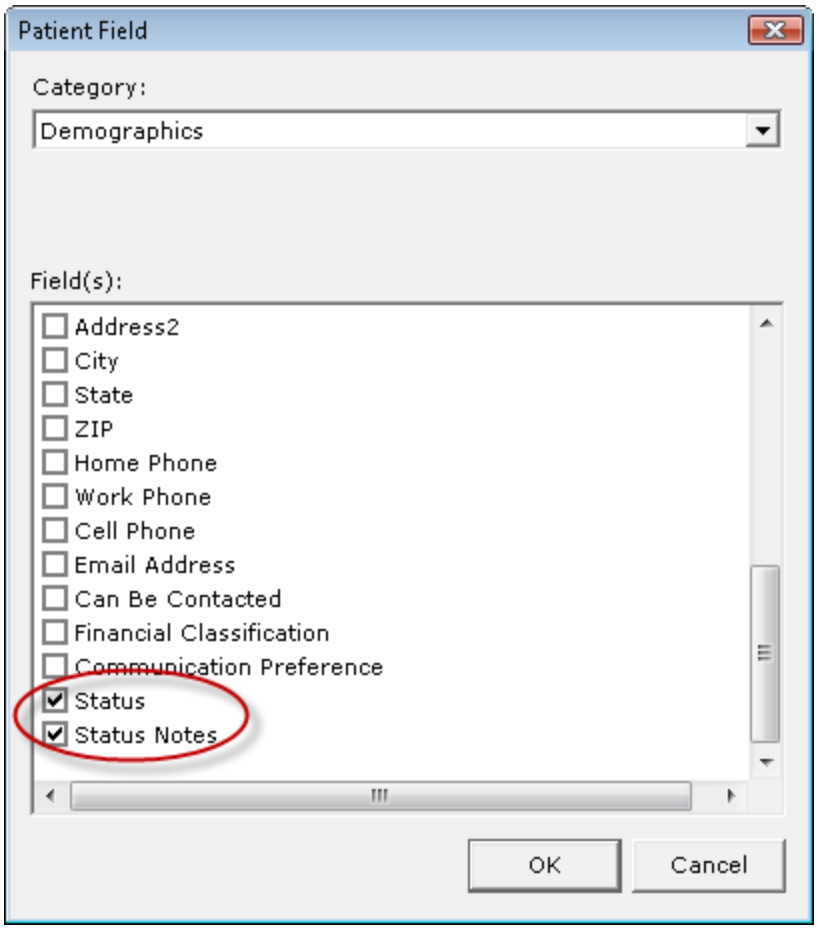

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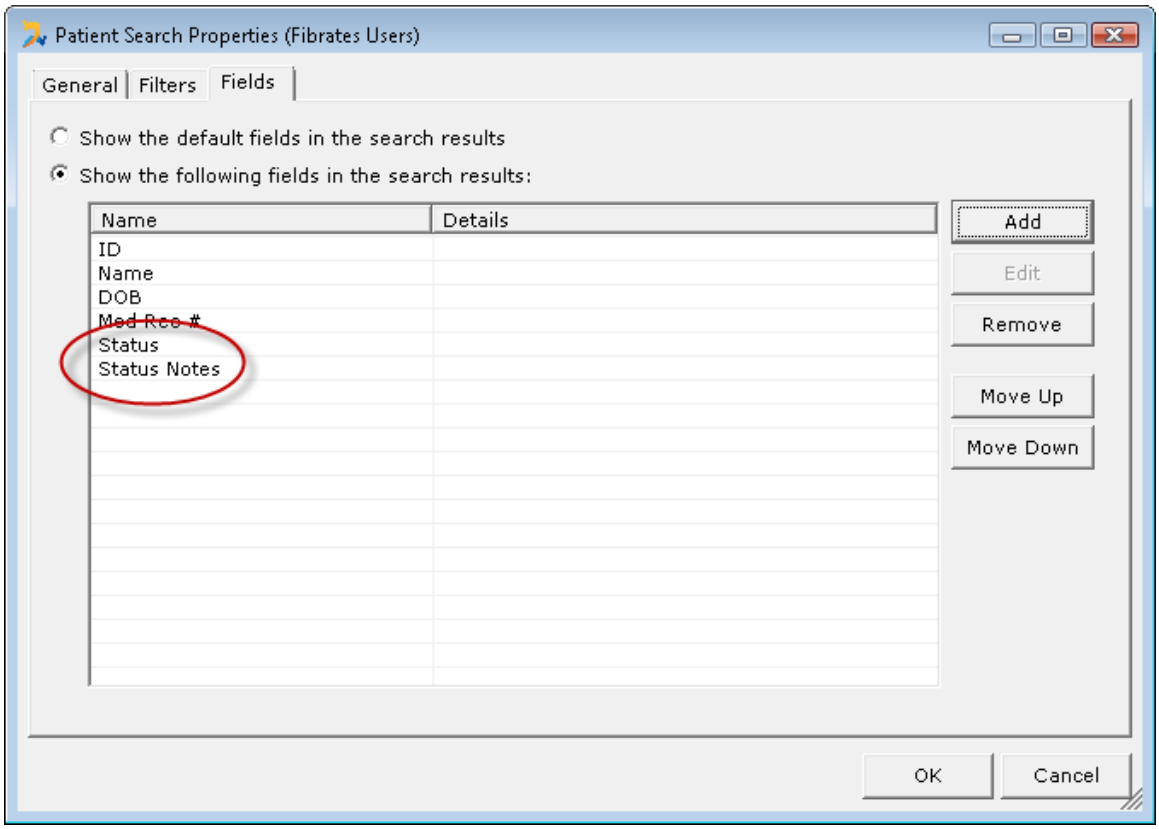
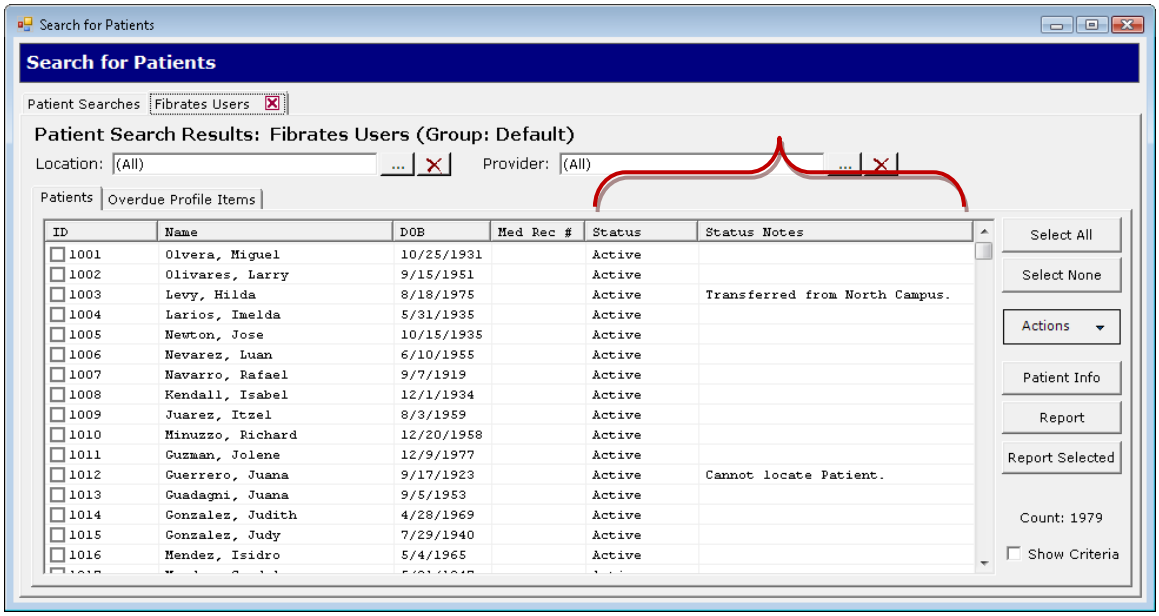


- Run the search.



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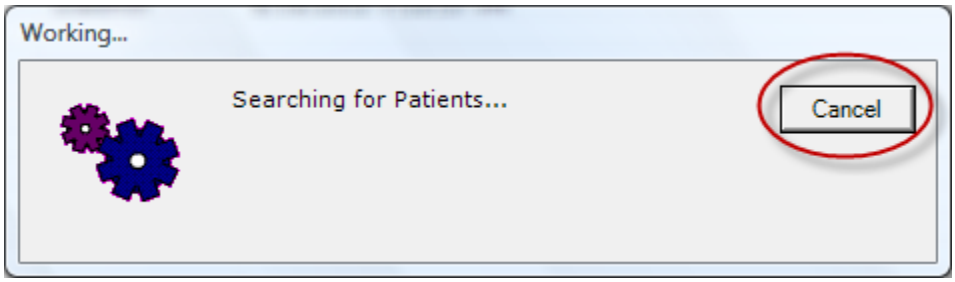
Cancel Patient Search

You now have the ability to cancel a Patient Search.

How to Get There:

Patient Search > (select search) > Do Search



- Run a search.
- To cancel the search, click the **Cancel** button.

Email Address Field

There is now a new **Email Address** search field.

How to Get There:

Patient Search > (select search) Edit > Fields > Show the Following Fields in the search results > Add

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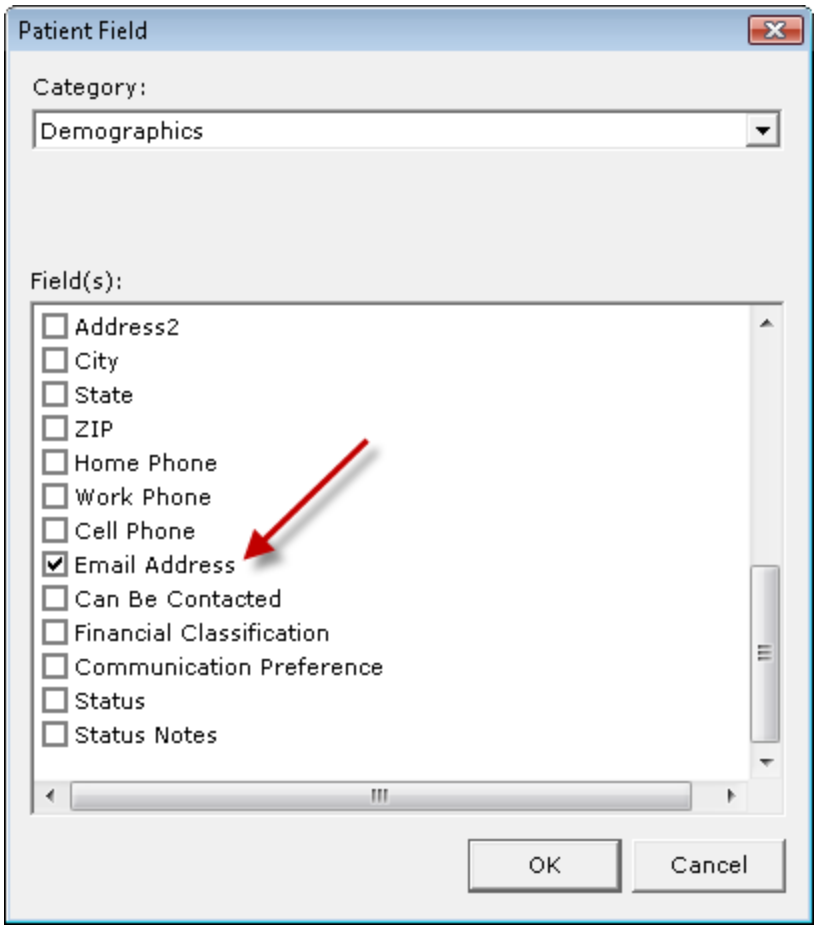

New Appointment Fields

The following new fields have been added to the **Appointments (Linked Software)** category: **LastApptDate**, **LastApptTime**, **LastApptProvider**, **LastApptFacility**.

How to Get There:

Patient Search > (select search) Edit > Fields > Show the Following Fields in the search results > Add > Appointments (Linked Software)

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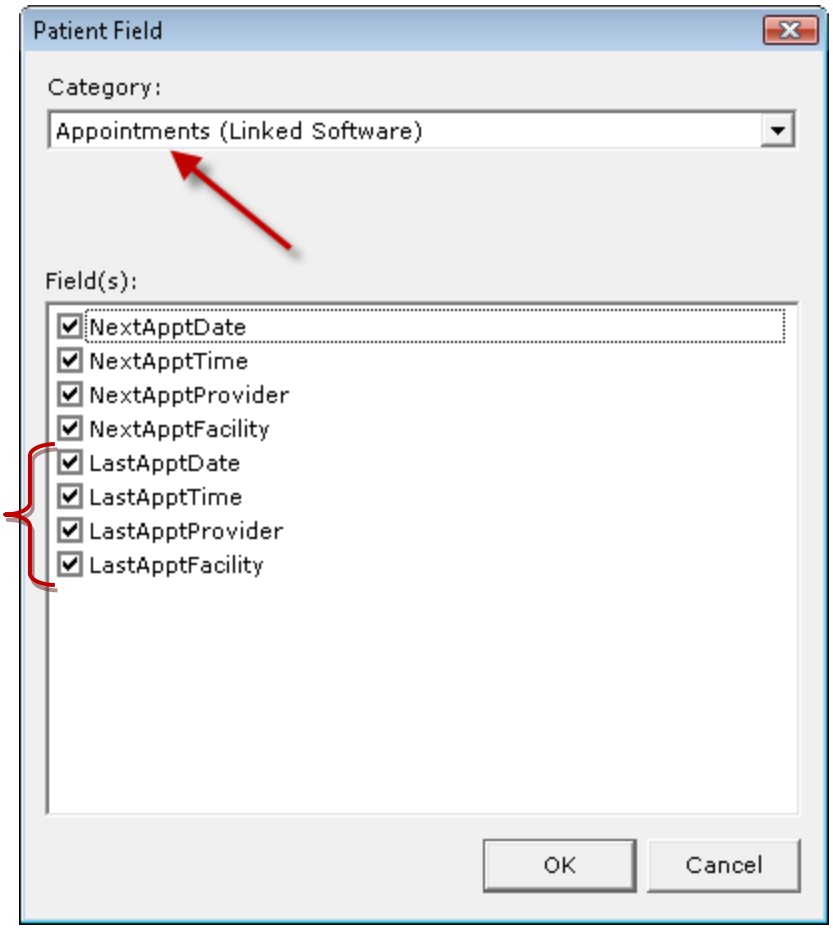

Activate Patients

There is a new **Activate Patients** feature you can select from the **Actions** menu of the **Patent List** screen (displays the results of a patient search). This allows you to select inactive (status: Not Active) patients and activate (status: Active) them.

How to Get There:

Patient Search > (select search) > Do Search > Actions > Activate Patients

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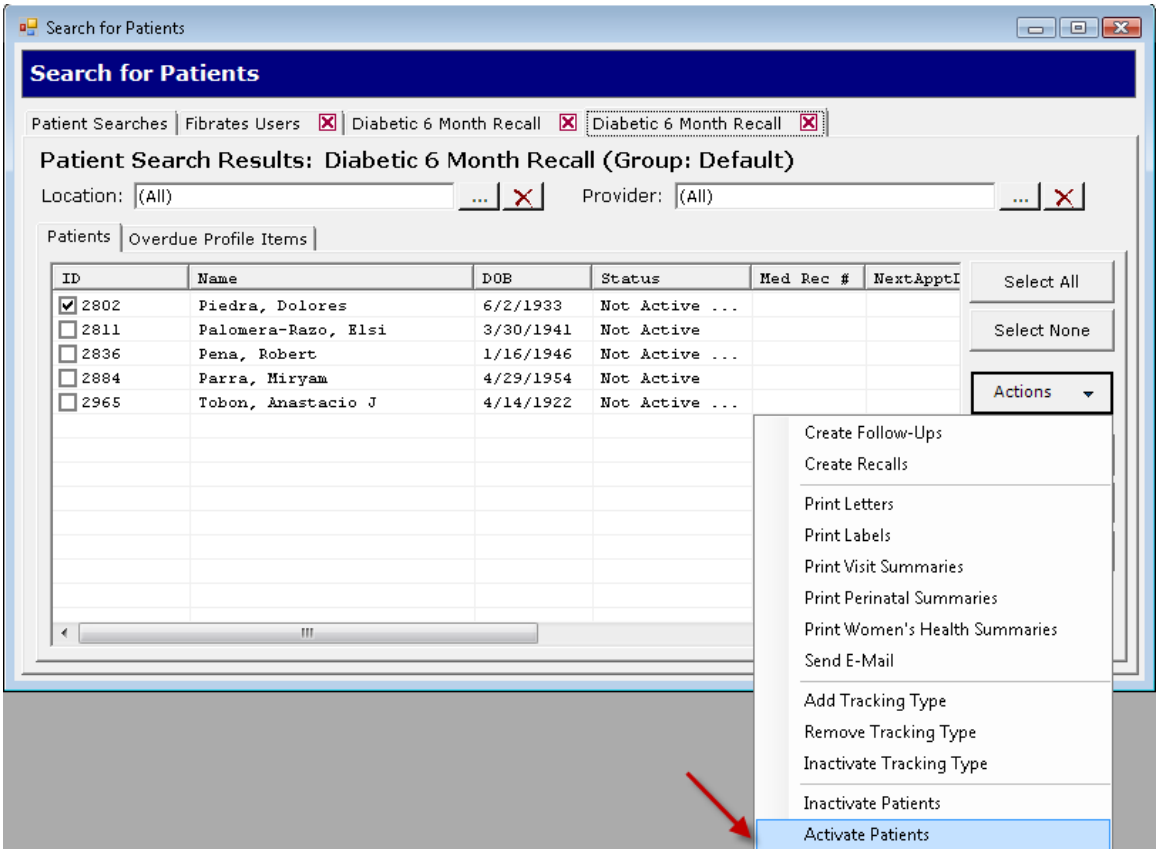

- Select a patient or patients from the list. You can use **Select All** if you want to activate all the patients in the list. Click **Actions** and select **Activate Patients**. Click **Yes** to change the patients status.

Filter Tracking Type by Date

In the Patient Search, when searching by Tracking Type, you can now filter by the date the Tracking Type was entered for the patient.

How to Get There:

Patient Search > (select search) Edit > Filters > Add > General > Tracking Types

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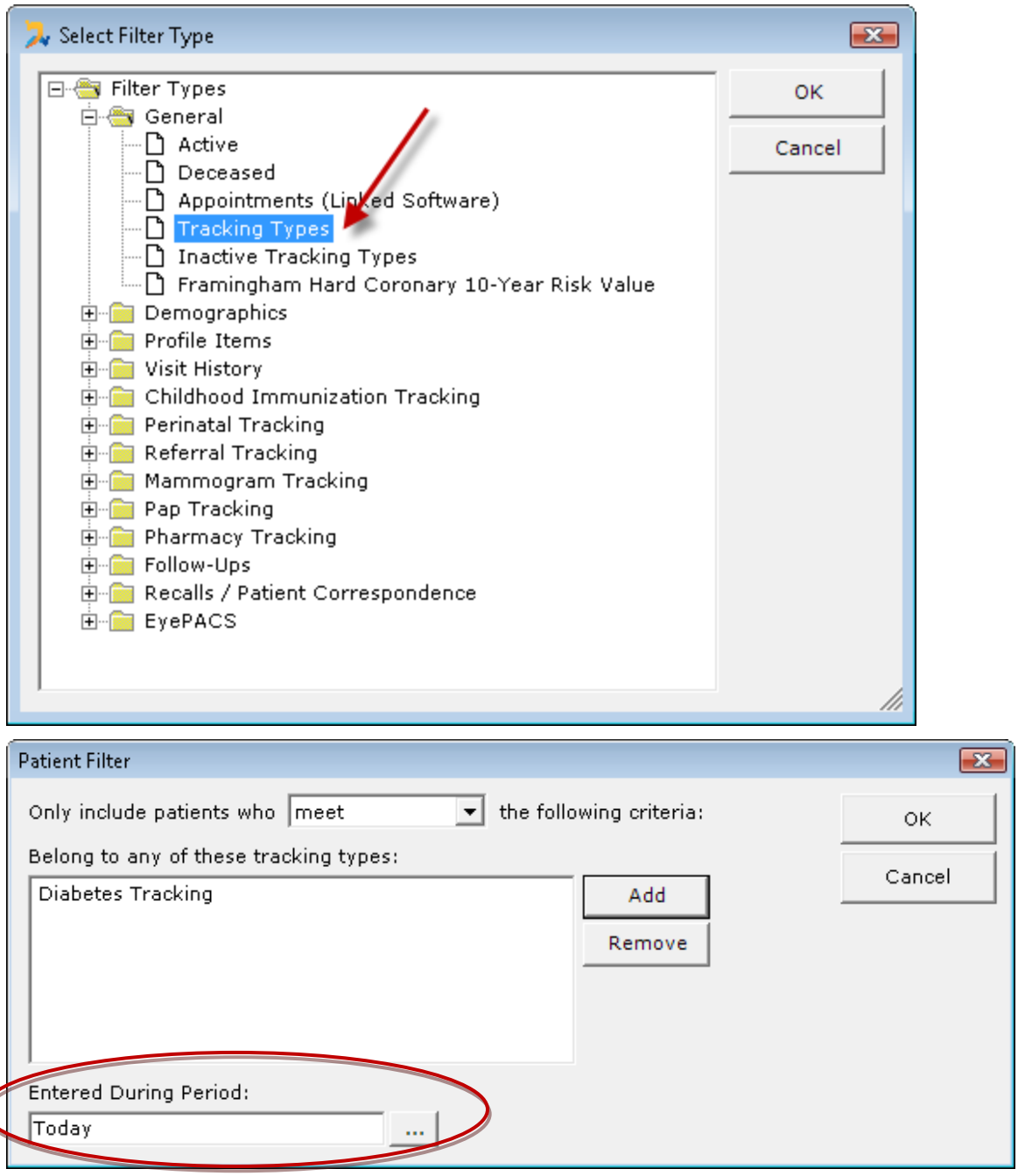

Filter by Patient's Default Provider

You can now filter Patient Search results by the patient's default provider. Select the **Provider** dropdown on the **Patient Search Results** screen for this.

How to Get There:

Patient Search > (select search) > Do Search

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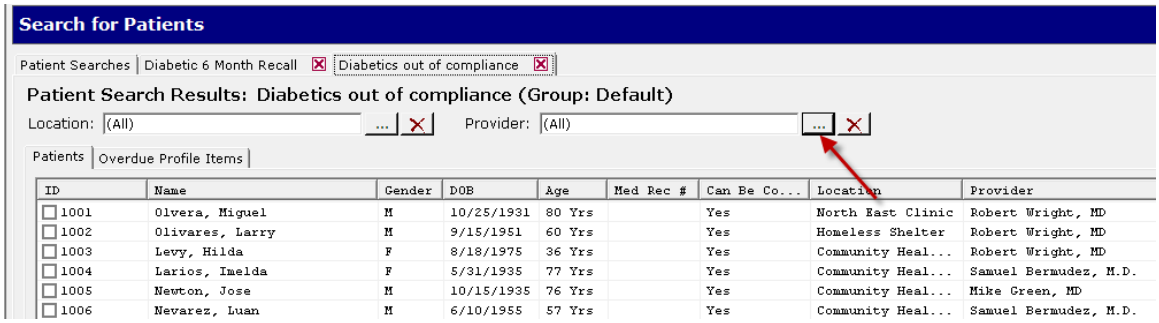
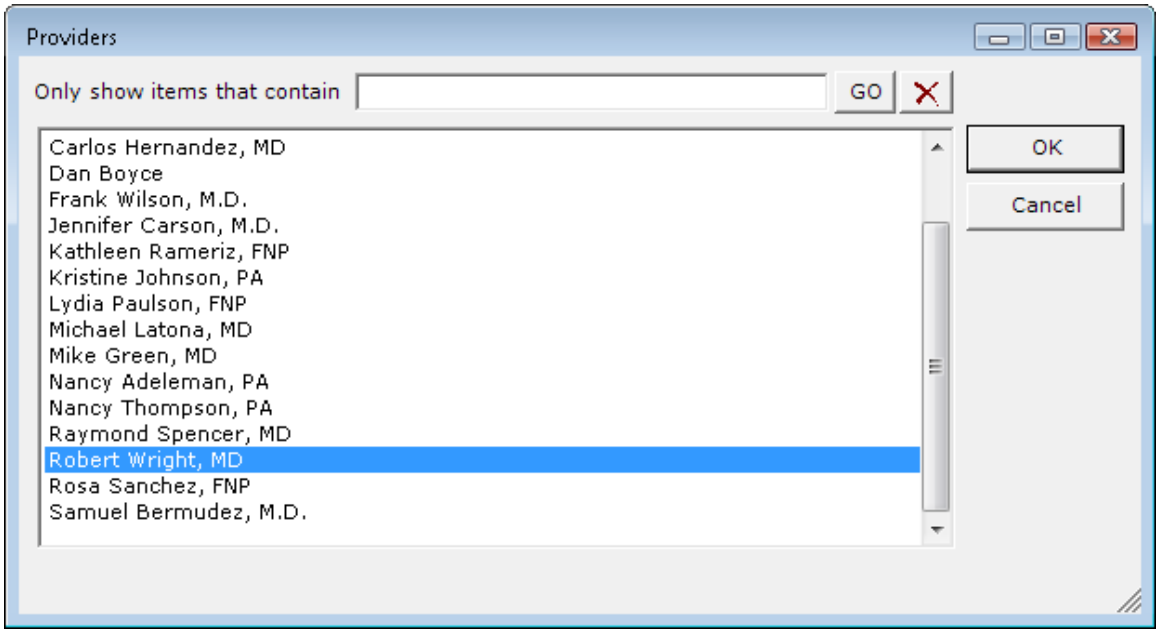

Search for Patients
Patient Searches
Diabetic 6 Month Recall
Diabetics out of compliance
Patient Search Results: Diabetics out of compliance (Group: Default)
Location: (All)
Provider: (All)
Patients
Overdue Profile Items
ID Name Gender DOB Age Med Rec # Can Be Co... Location Provider
1001 Olvera, Miguel M 10/25/1931 80 Yrs Yes North East Clinic Robert Wright, MD
1002 Olivares, Larry M 9/15/1951 60 Yrs Yes Homeless Shelter Robert Wright, MD
1003 Levy, Hilda F 8/18/1975 36 Yrs Yes Community Heal... Robert Wright, MD
1004 Larios, Imelda F 5/31/1935 77 Yrs Yes Community Heal... Samuel Bermudez, M.D.
1005 Newton, Jose M 10/15/1935 76 Yrs Yes Community Heal... Mike Green, MD
1006 Nevarez, Luan M 6/10/1955 57 Yrs Yes Community Heal... Samuel Bermudez, M.D.

- Select the provider and click **OK**.



Report Selected Button

There is a **Report Selected** button on the **Patient Search Results** screen that allows you to view / print a report of the currently selected / checked patients.

How to Get There:

Patient Search > (select search) > Do Search

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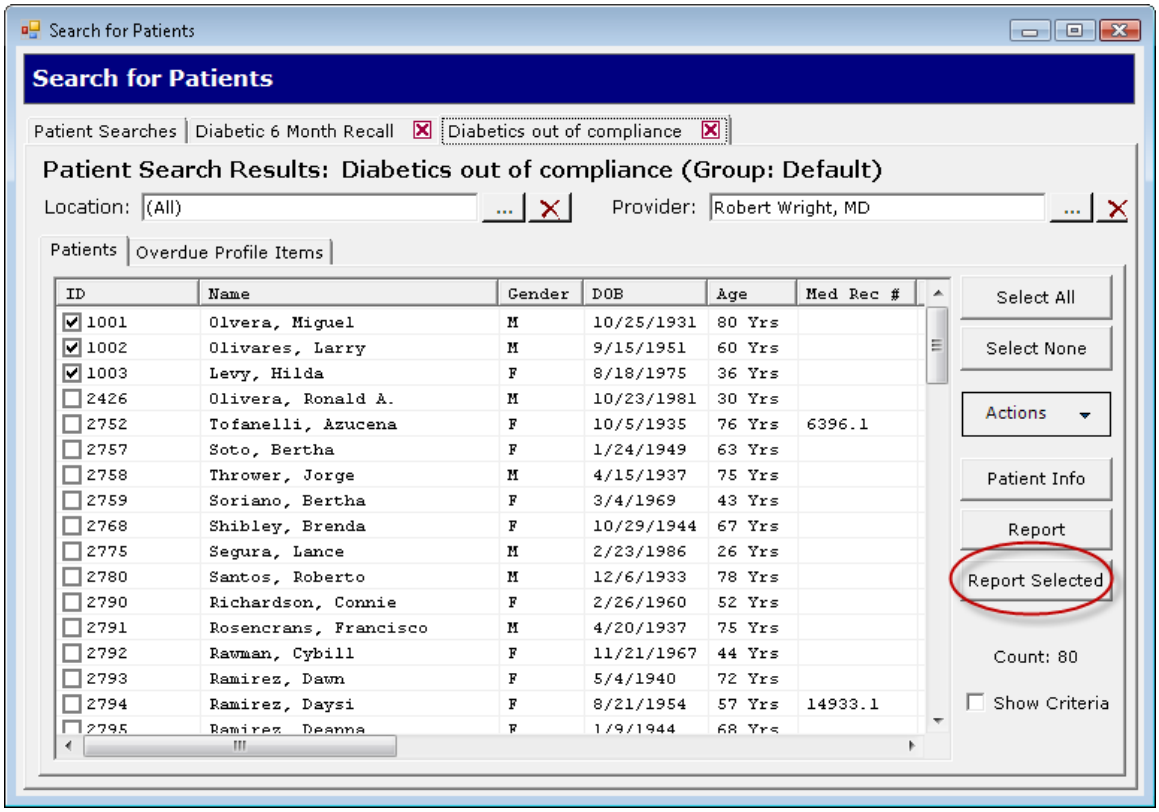
Search for Patients
Search for Patients
Patient Searches
Diabetic 6 Month Recall
Diabetics out of compliance
Patient Search Results: Diabetics out of compliance (Group: Default)
Location: (All)
Provider: Robert Wright, MD
Patients
Overdue Profile Items
ID Name Gender DOB Age Med Rec #
1001 Olvera, Miguel M 10/25/1931 80 Yrs
1002 Olivares, Larry M 9/15/1951 60 Yrs
1003 Levy, Hilda F 8/18/1975 36 Yrs
2426 Olivera, Ronald A. M 10/23/1981 30 Yrs
2752 Tofanelli, Azucena F 10/5/1935 76 Yrs 6396.1
2757 Soto, Bertha F 1/24/1949 63 Yrs
2758 Thrower, Jorge M 4/15/1937 75 Yrs
2759 Soriano, Bertha F 3/4/1969 43 Yrs
2768 Shibley, Brenda F 10/29/1944 67 Yrs
2775 Segura, Lance M 2/23/1986 26 Yrs
2780 Santos, Roberto M 12/6/1933 78 Yrs
2790 Richardson, Connie F 2/26/1960 52 Yrs
2791 Rosencrans, Francisco M 4/20/1937 75 Yrs
2792 Rawman, Cybill F 11/21/1967 44 Yrs
2793 Ramirez, Dawn F 5/4/1940 72 Yrs
2794 Ramirez, Daysi F 8/21/1954 57 Yrs 14933.1
Select All
Select None
Actions
Patient Info
Report
Report Selected
Count: 80
Show Criteria

Custom Report Writer Enhancements

The Population Analytics custom report writer has been greatly enhanced to make it easier to design reports. The following have been enhanced:

- Report **Design** tab
- Printing the design layout
- Patient filter selection
- **Data Mappings** and **Notes** columns
- Five levels of report items

New Report Design Tab

The user interface in the report **Design** tab has been changed to use a grid format. This allows you to see the populations and filters that are assigned to report items. There are now buttons next to each report item that make it easier to perform operations at the individual item level.

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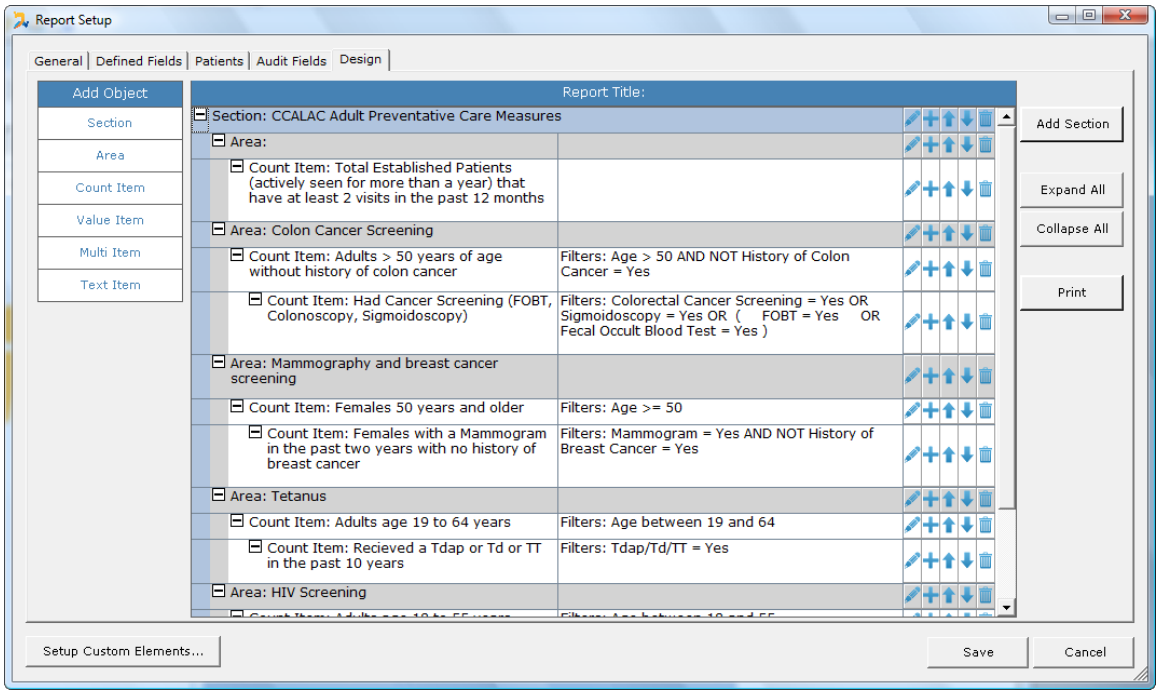
How to Get There:

Setup > Printing and Reporting > Population Analytics > Reports > (select report) > Edit > Design


Report Setup
General
Defined Fields
Patients
Audit Fields
Design
Add Object
Section
Area
Count Item
Value Item
Multi Item
Text Item
Report Title:
Section: CCALAC Adult Preventative Care Measures
Area:
Count Item: Total Established Patients (actively seen for more than a year) that have at least 2 visits in the past 12 months
Area: Colon Cancer Screening
Count Item: Adults > 50 years of age without history of colon cancer
Filters: Age > 50 AND NOT History of Colon Cancer = Yes
Count Item: Had Cancer Screening (FOBT, Colonoscopy, Sigmoidoscopy)
Filters: Colorectal Cancer Screening = Yes OR Sigmoidoscopy = Yes OR (FOBT = Yes OR Fecal Occult Blood Test = Yes)
Area: Mammography and breast cancer screening
Count Item: Females 50 years and older
Filters: Age >= 50
Count Item: Females with a Mammogram in the past two years with no history of breast cancer
Filters: Mammogram = Yes AND NOT History of Breast Cancer = Yes
Area: Tetanus
Count Item: Adults age 19 to 64 years
Filters: Age between 19 and 64
Count Item: Recieved a Tdap or Td or TT in the past 10 years
Filters: Tdap/Td/TT = Yes
Area: HIV Screening
Add Section
Expand All
Collapse All
Print
Setup Custom Elements...
Save
Cancel

Print Design Layout

Added Print functionality to the report **Design** tab allowing you to print the contents of the Design Layout. Click the **Print** button.

How to Get There:

Setup > Printing and Reporting > Population Analytics > Reports > (select report) > Edit > Design > Print

Patient Filter Selections

There is a new Patient Filter selection form that allows you to drag-and-drop Defined/Standard fields when making field selections during the filter creation process.

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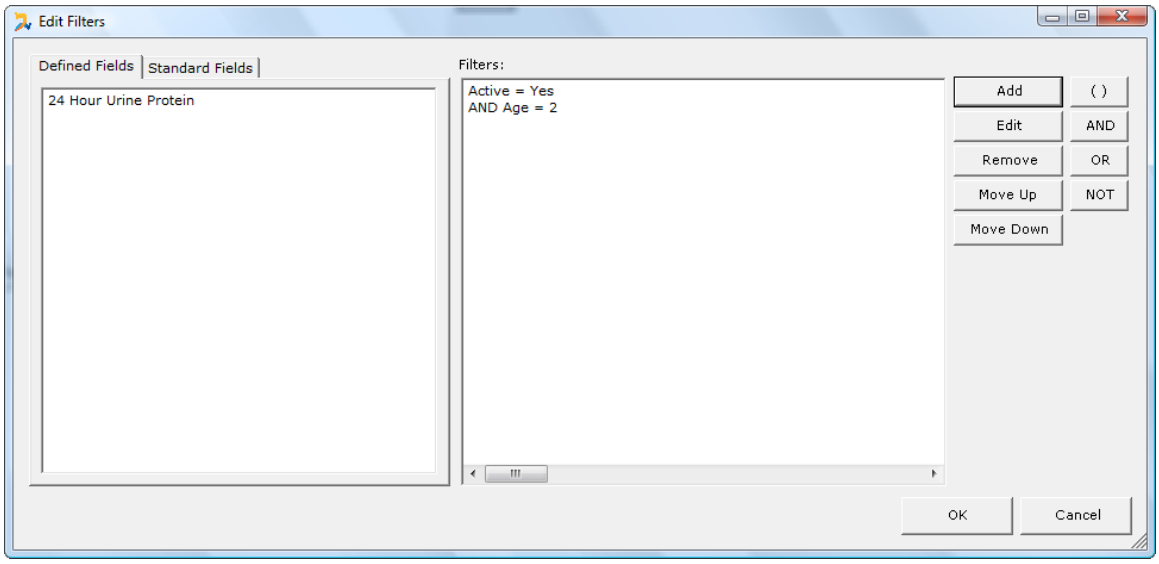
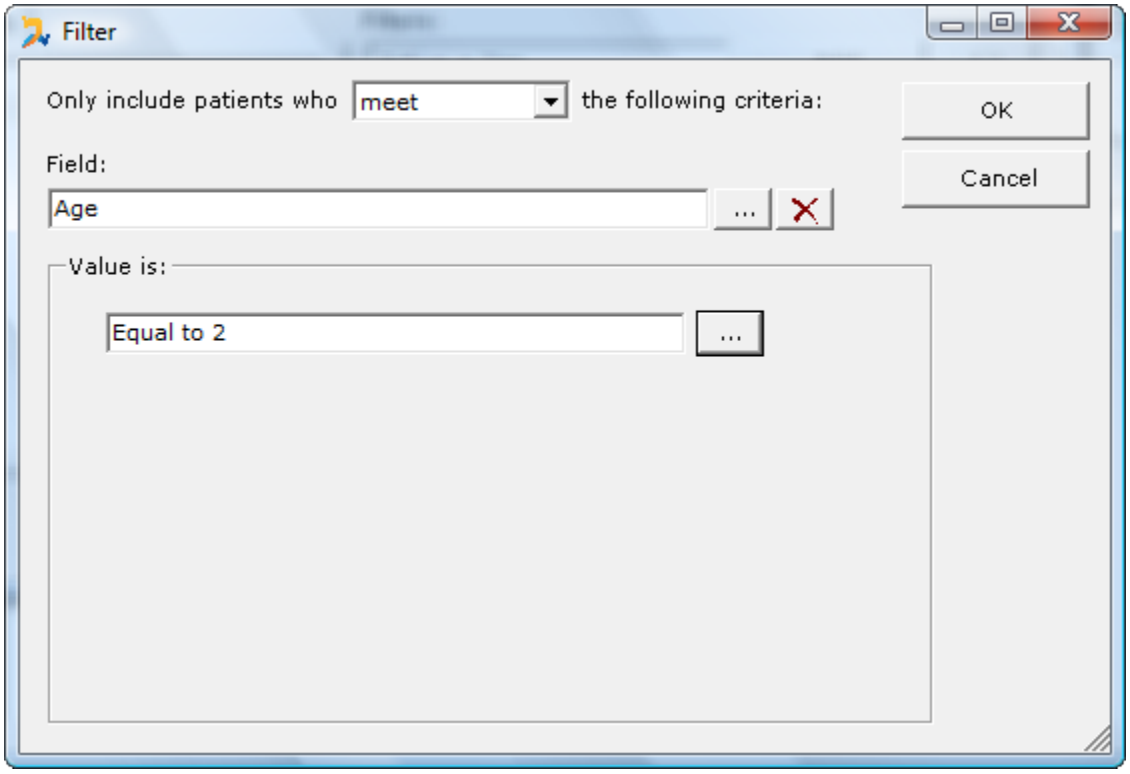
How to Get There:

Setup > Printing and Reporting > Population Analytics > Reports > (select report) > Edit > Patients > Add > … (button) > Standard Fields >





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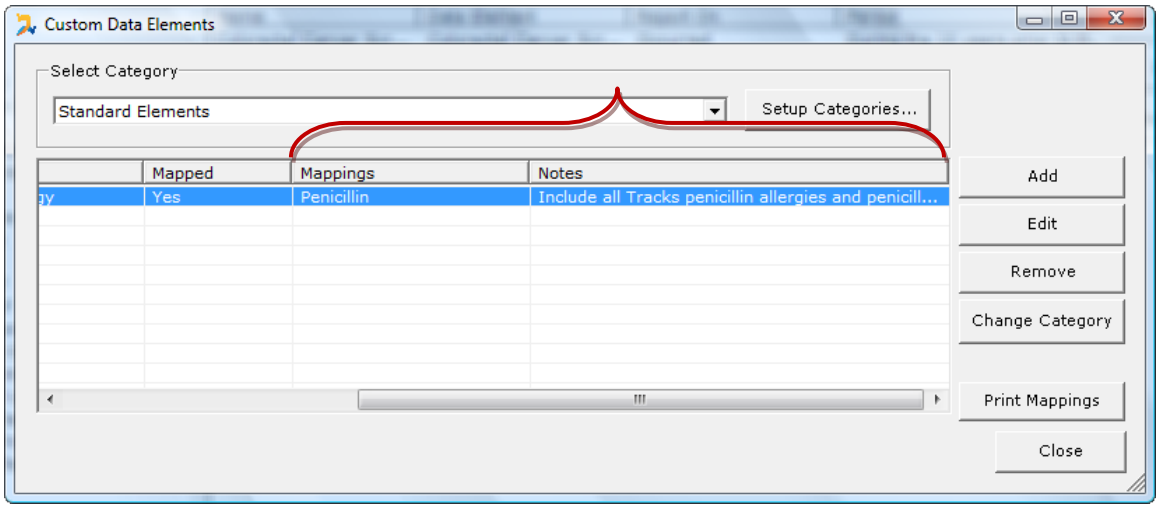
Data Mappings and Notes Columns

In the **Custom Data Elements** list, a **Mappings** column displays the current mappings for the element and a **Notes** column displays the mapping notes for the element.

How to Get There:

Setup > Printing and Reporting > Population Analytics > Reports > (select report) > Edit > General > Setup Custom Elements > Select Category > Add or Edit



Five Levels of Report Items

You may now have up to five levels of report items in your custom reports. The previous limit was three levels.

Administrative Enhancements

The following administrative enhancements have been added:

- Terminate an i2iTracks session
- Report of Users and User Groups
- Vitals inactivity notification
- Member Equivalent Value

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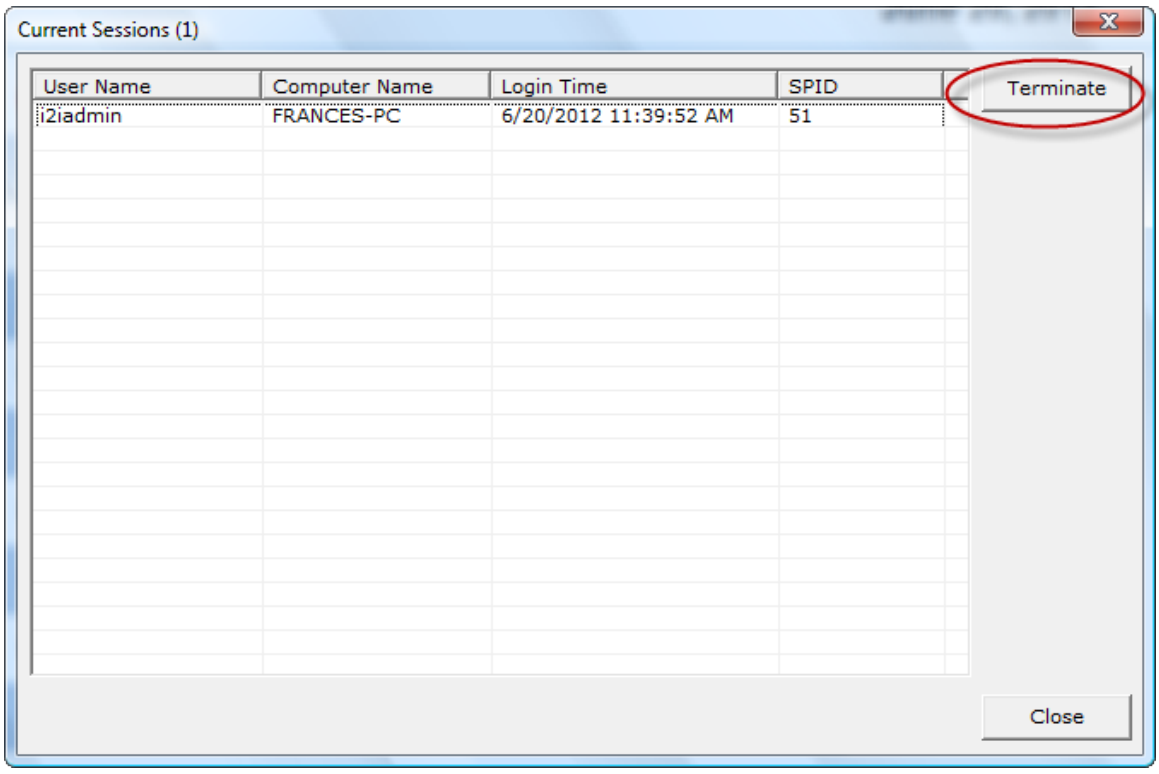
Terminate i2iTracks Session

i2iTracks administrators now have the ability to terminate another user's i2iTracks session from the **View Current Sessions** screen.

How to Get There:

File > Admin Tools > View Current Sessions



Report of Users and User Groups

In the **Security** screen, there is now a **Report** button that allows you to display a report of all users and the User Group each belongs to.

How to Get There:

File > Admin Tools > Security

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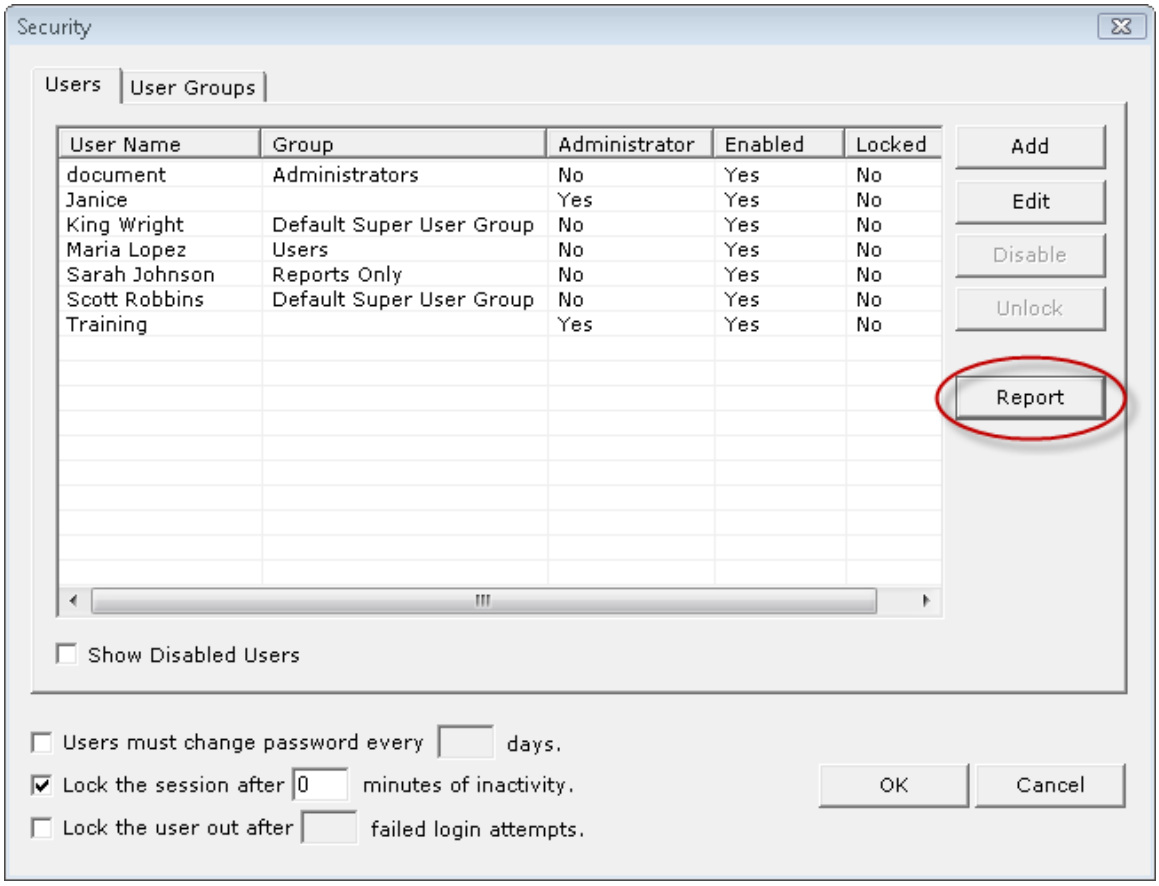

Notification of Vitals Inactivity

In the **Interface Inactivity Notification** screen, there is now an option to display an alert at i2iTracks startup if vitals have not been added / modified in the last "X" number of days.

How to Get There:

File > Admin Tools > Interfaces > Interface Inactivity Notification

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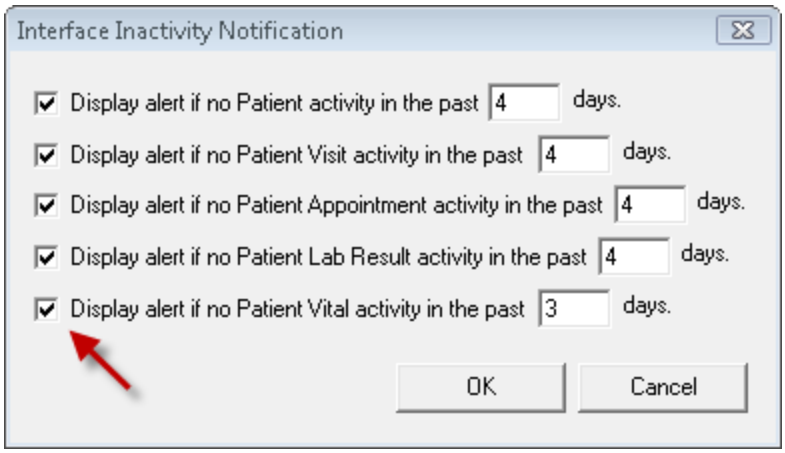
Interface Inactivity Notification
Display alert if no Patient activity in the past 4 days.
Display alert if no Patient Visit activity in the past 4 days.
Display alert if no Patient Appointment activity in the past 4 days.
Display alert if no Patient Lab Result activity in the past 4 days.
Display alert if no Patient Vital activity in the past 3 days.
OK
Cancel

Member Equivalent Value

There is a new feature that automatically calculates the *Member Equivalent Value* for patients and assigns it to an **Other Profile** Item. This is an optional feature which must be activated on a per-customer basis.

Member Equivalent Value Calculation

This value is calculated as follows:

```
Member Equivalent Value = (Health Patient Demand + [2]) * 0.4762
```

Healthy Patient Demand is determined by Age and Gender of Patient as follows:

What's a Healthy Member's Base Visit-Demand?

Age	Female		Male	
	Score		Score	
0 – 2	6		6	
3 – 9	2		2	
10 – 17	1		1	
18 – 49	2		1	
50 – 64	2		1	
65 – 69	2		2	
70 and over	3		3	

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An additional value of **2** is added to the calculation **if** a patient has any of the following Mapped Ambulatory Conditions (it is assumed that visit demand increases as a result of condition):

(Ambulatory Sensitive Conditions)
IHD
Asthma
COPD
CHF
Seizure Disorder
Diabetes
Hypertension
Hepatic Disease
Irritable/Inflammatory Bowel Disease
Neuromuscular Disease
Renal Disease
Stroke
Substance Abuse
Rheumatologic Disorders (inc. RA, SLE)
Cystic Fibrosis
Psychiatric Disorder
Hyperlipidemia

Member Equivalent Value Setup:

In order to utilize the Member Equivalent Value functionality, you must set up and map the data used in the calculation.

How to Get There:

File > Admin Tools > Member Equivalent Value Setup

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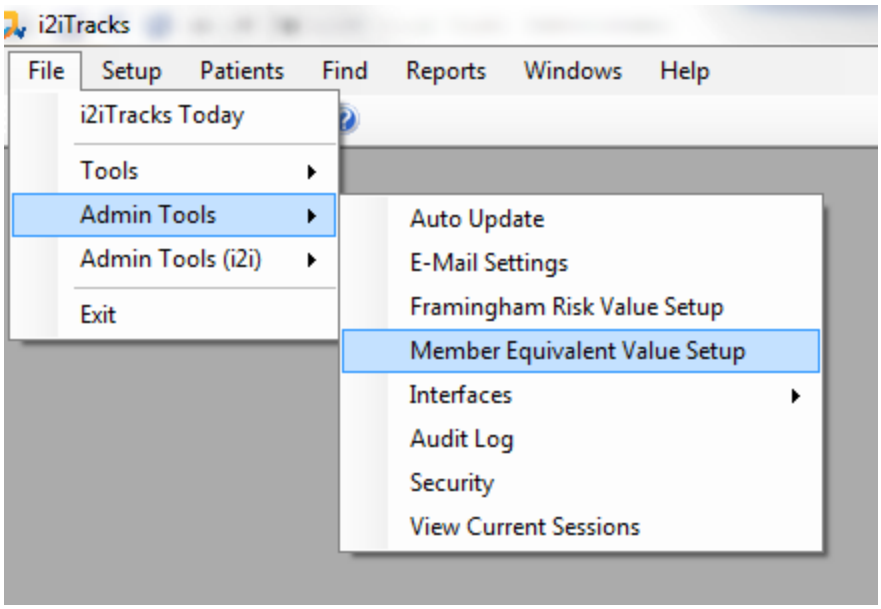

- You must map all applicable *Ambulatory Sensitive Conditions* and activate the functionality by checking the **Enable Member Equivalent Value** checkbox.

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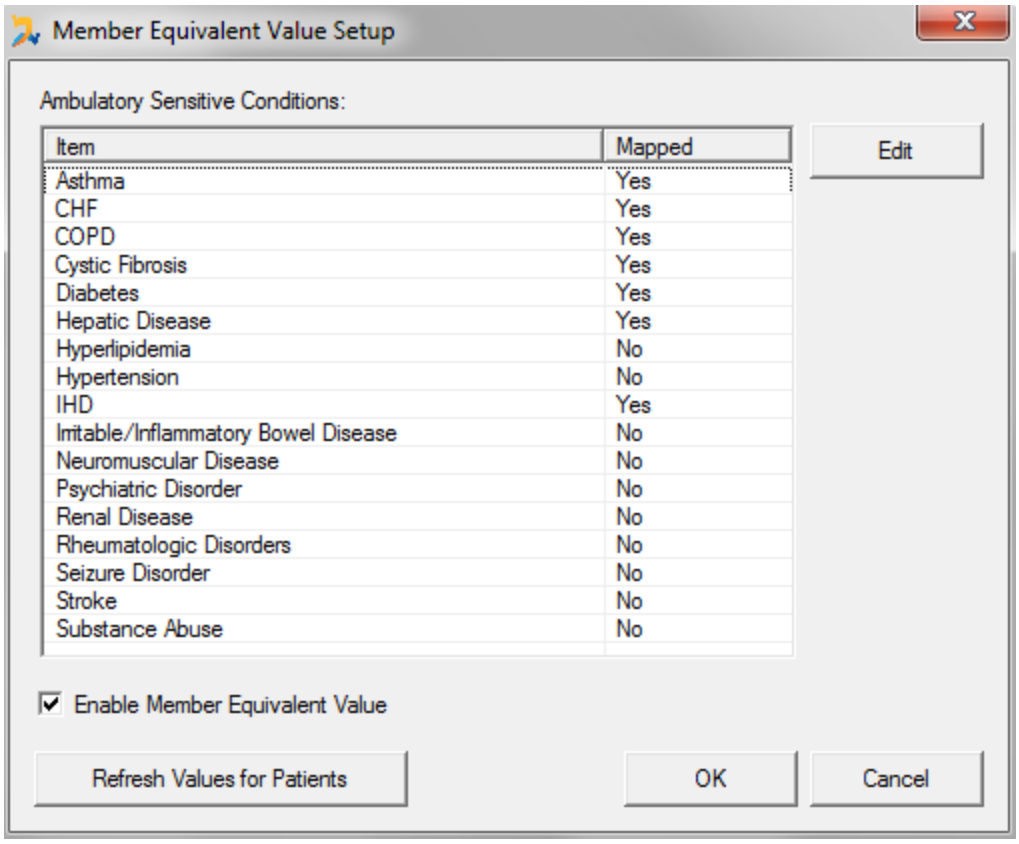

- To initialize/trigger the calculation and assignment of Member Equivalent Values for all patients in the database, click the **Refresh Values for Patients** button from this same setup screen.

***NOTE*: In order for the Member Equivalent Values to be refreshed automatically, a SQL Server Job/Task must be created/scheduled for each customer database (additional setup required on our side).**

The Member Equivalent Value for a given patient will be saved as an internal i2i **Other Profile** Item and can be viewed in the **Patient Info History** tab.

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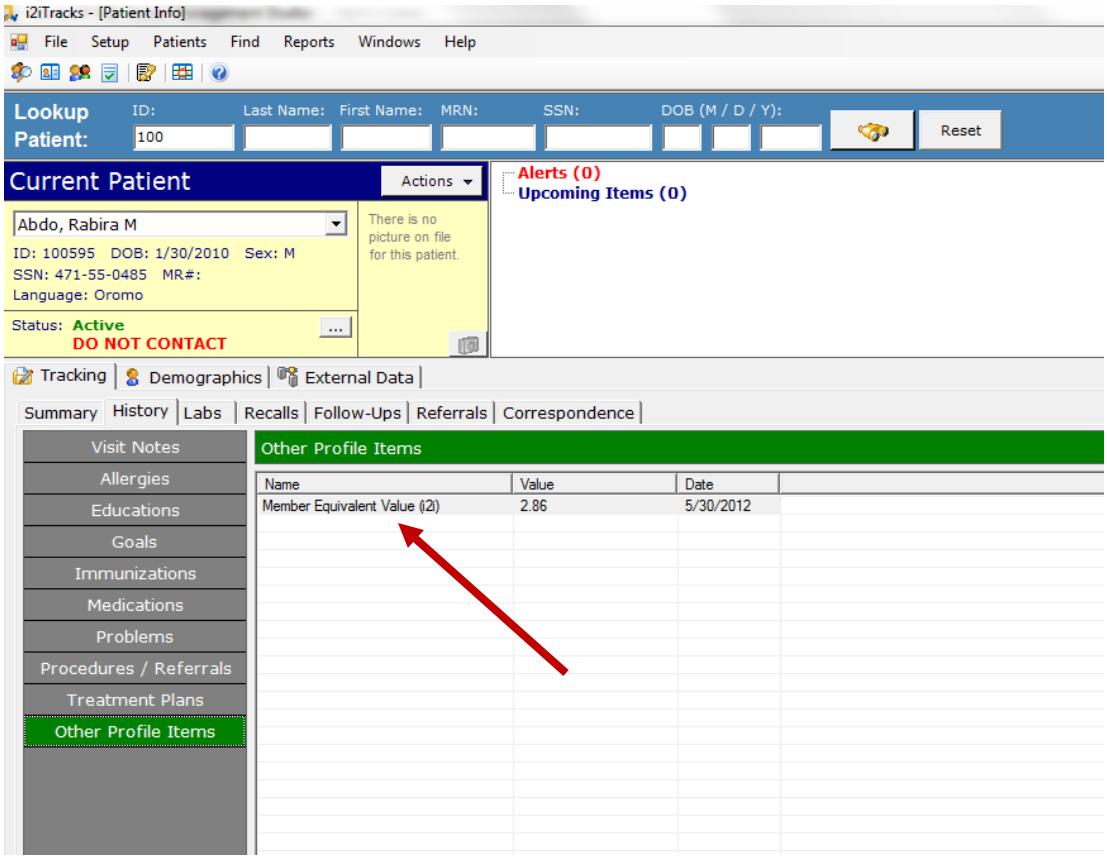

Patient List Enhancements

The following **Patient List** enhancements and changes have been made:

- **Create Follow-Ups** menu item
- **Patient List** security rights

Create Follow-Ups

There is a new **Create Follow-Ups** feature on the **Actions** menu of the **Patient List** screen (screen that displays the results of a patient search). This feature allows you to create a follow-up for the currently selected (checked) patients

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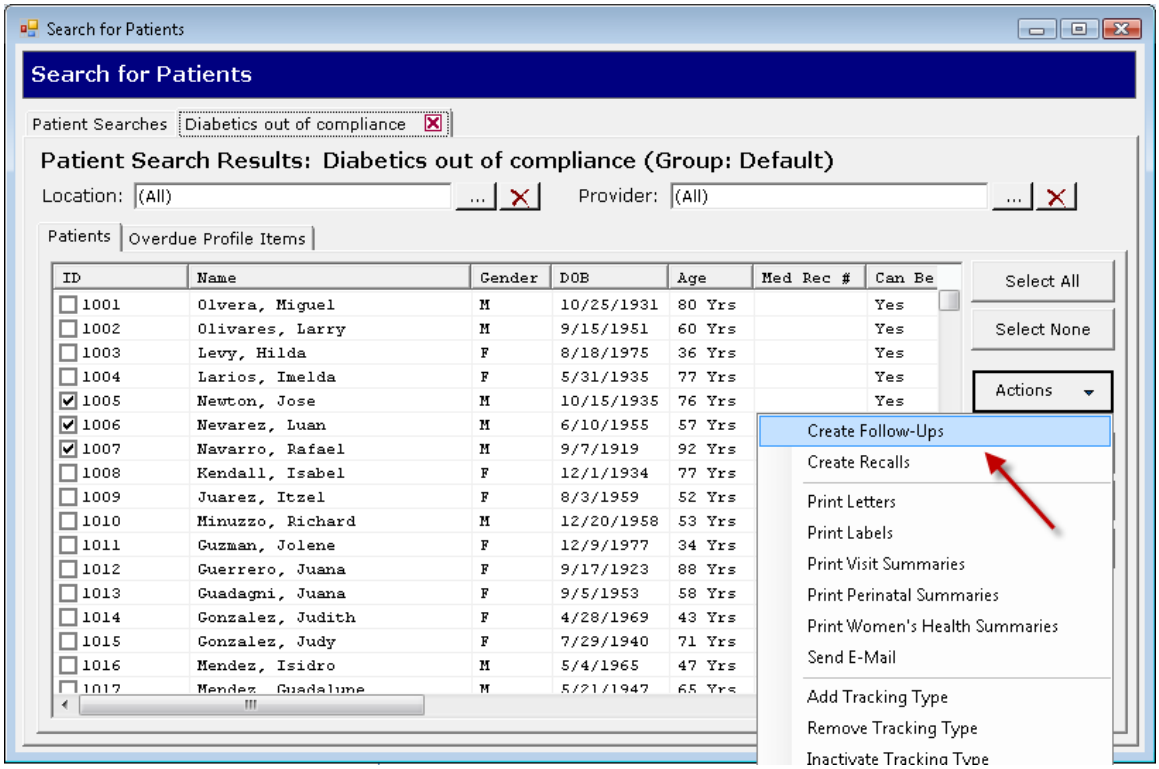
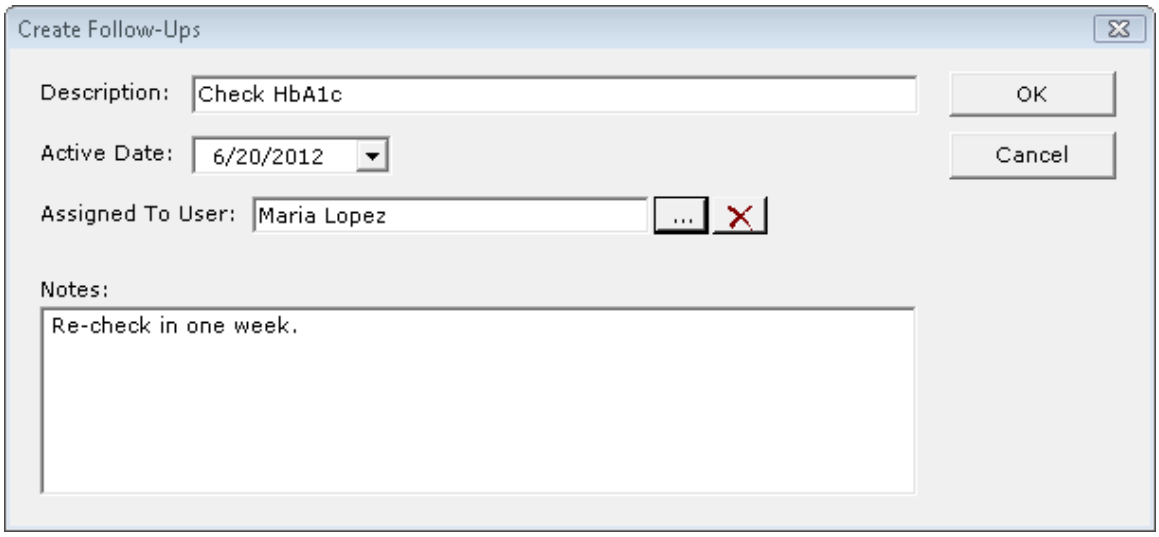
How to Get There:

Patient Search > (select search) > Do Search > Actions > Create Follow-Ups


Search for Patients
Search for Patients
Patient Searches
Diabetics out of compliance
Patient Search Results: Diabetics out of compliance (Group: Default)
Location: (All)
Provider: (All)
Patients
Overdue Profile Items
ID
Name
Gender
DOB
Age
Med Rec #
Can Be
1001 Olvera, Miguel M 10/25/1931 80 Yrs Yes
1002 Olivares, Larry M 9/15/1951 60 Yrs Yes
1003 Levy, Hilda F 8/18/1975 36 Yrs Yes
1004 Larios, Imelda F 5/31/1935 77 Yrs Yes
1005 Newton, Jose M 10/15/1935 76 Yrs Yes
1006 Nevarez, Luan M 6/10/1955 57 Yrs
1007 Navarro, Rafael M 9/7/1919 92 Yrs
1008 Kendall, Isabel F 12/1/1934 77 Yrs
1009 Juarez, Itzel F 8/3/1959 52 Yrs
1010 Minuzzo, Richard M 12/20/1958 53 Yrs
1011 Guzman, Jolene F 12/9/1977 34 Yrs
1012 Guerrero, Juana F 9/17/1923 88 Yrs
1013 Guadagni, Juana F 9/5/1953 58 Yrs
1014 Gonzalez, Judith F 4/28/1969 43 Yrs
1015 Gonzalez, Judy F 7/29/1940 71 Yrs
1016 Mendez, Isidro M 5/4/1965 47 Yrs
Select All
Select None
Actions
Create Follow-Ups
Create Recalls
Print Letters
Print Labels
Print Visit Summaries
Print Perinatal Summaries
Print Women's Health Summaries
Send E-Mail
Add Tracking Type
Remove Tracking Type
Inactivate Tracking Type



- The follow-up will appear on the patient's **Tracking > Follow-Ups** tab.

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Patient List Rights

You no longer need to be an administrator to Add, Remove, and Inactivate tracking types for patients using the **Actions** menu in the **Patient List** screen. Now, to perform these operations, you only need to have sufficient rights for **Tracking Types**.

Printing Enhancements

The following printing enhancements and changes have been made:

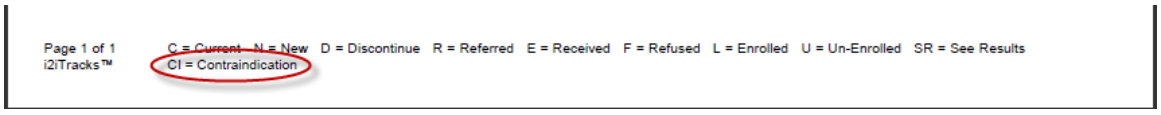
- Contraindications noted in **Visit Summary** report footer
- Multiple patient visit summaries printed as one print job
- Wide reports are made to fit paper

Contraindications

Added "CI = Contraindication" to the footer of the Visit Summary

How to Get There:

(selected Patient) > Actions > Print Visit Summary


Page 1 of 1
i2iTracks™
C = Current N = New D = Discontinue R = Referred E = Received F = Refused L = Enrolled U = Un-Enrolled SR = See Results
CI = Contraindication

Print Patient Visit Summaries

When printing a **Patient Visit Summary** for multiple patients, it now prints the visit summaries as a single print job. This improves efficiency and prevents a window from being displayed for each visit summary when printing to a PDF Writer.

How to Get There:

Patient Search > (select search) > Do Search > (select multiple patients) > Actions > Print Visit Summaries

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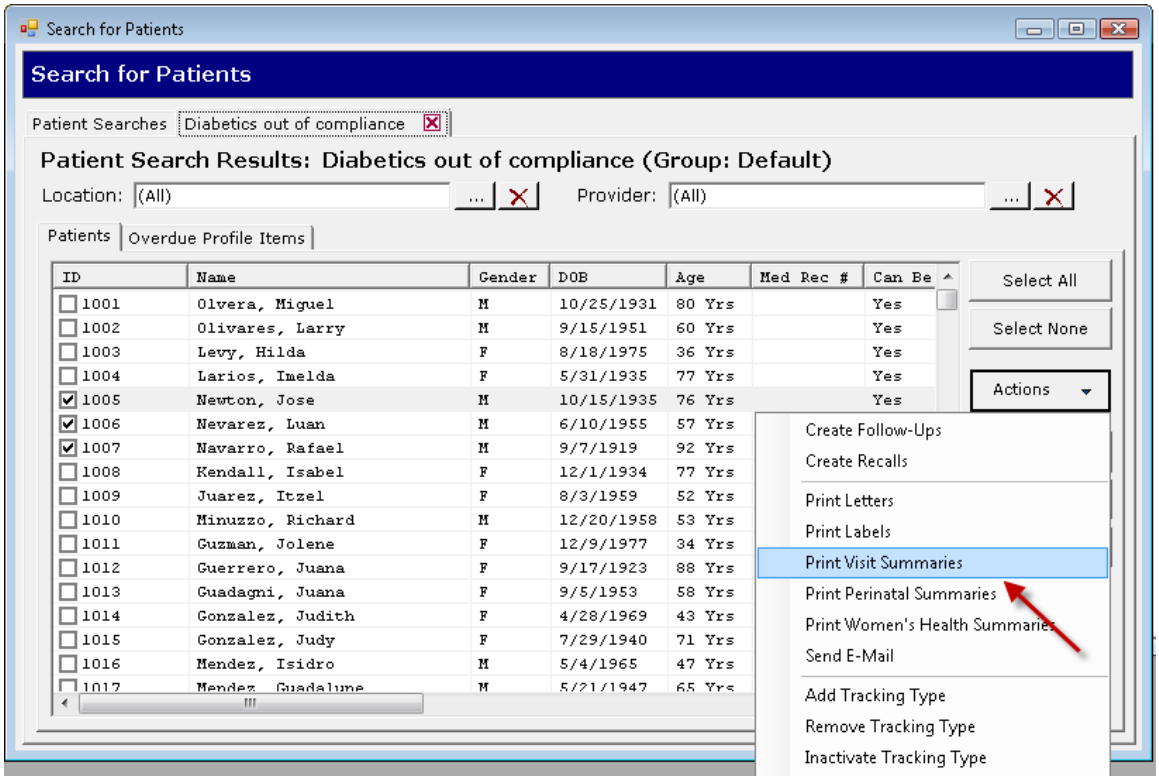
Search for Patients
Search for Patients
Patient Searches
Diabetics out of compliance
Patient Search Results: Diabetics out of compliance (Group: Default)
Location: (All)
Provider: (All)
Patients
Overdue Profile Items
ID Name Gender DOB Age Med Rec # Can Be
1001 Olvera, Miguel M 10/25/1931 80 Yrs Yes
1002 Olivares, Larry M 9/15/1951 60 Yrs Yes
1003 Levy, Hilda F 8/18/1975 36 Yrs Yes
1004 Larios, Imelda F 5/31/1935 77 Yrs Yes
1005 Newton, Jose M 10/15/1935 76 Yrs Yes
1006 Nevarez, Luan M 6/10/1955 57 Yrs
1007 Navarro, Rafael M 9/7/1919 92 Yrs
1008 Kendall, Isabel F 12/1/1934 77 Yrs
1009 Juarez, Itzel F 8/3/1959 52 Yrs
1010 Minuzzo, Richard M 12/20/1958 53 Yrs
1011 Guzman, Jolene F 12/9/1977 34 Yrs
1012 Guerrero, Juana F 9/17/1923 88 Yrs
1013 Guadagni, Juana F 9/5/1953 58 Yrs
1014 Gonzalez, Judith F 4/28/1969 43 Yrs
1015 Gonzalez, Judy F 7/29/1940 71 Yrs
1016 Mendez, Isidro M 5/4/1965 47 Yrs
Select All
Select None
Actions
Create Follow-Ups
Create Recalls
Print Letters
Print Labels
Print Visit Summaries
Print Perinatal Summaries
Print Women's Health Summaries
Send E-Mail
Add Tracking Type
Remove Tracking Type
Inactivate Tracking Type

Wide Reports

There is now improved printing for wide reports (for example, those with multiple periods). Reports will now print in landscape mode if needed. If the report won't fit in landscape mode, the report will be reduced in size to fit.

Other Enhancements

Many additional enhancements have been made to i2iTracks, as described below.

Procedure Name and Diagnosis Code

i2iTracks now displays the procedure name and diagnosis codes for each visit in the **External Data > Visits** tab of the **Patient Info** screen.

How to Get There:

(selected patient) > External Data > Visits

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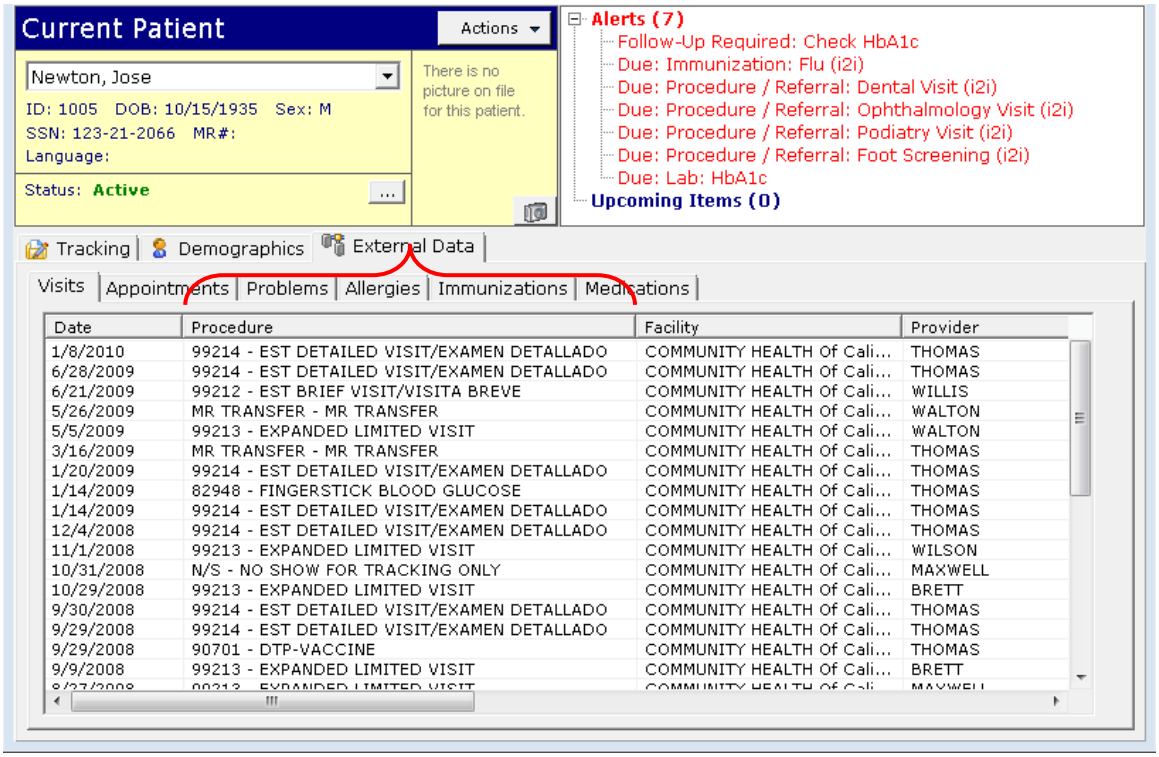
Current Patient
Actions
Newton, Jose
ID: 1005 DOB: 10/15/1935 Sex: M
SSN: 123-21-2066 MR#:
Language:
Status: Active
There is no picture on file for this patient.
Alerts (7)
Follow-Up Required: Check HbA1c
Due: Immunization: Flu (i2i)
Due: Procedure / Referral: Dental Visit (i2i)
Due: Procedure / Referral: Ophthalmology Visit (i2i)
Due: Procedure / Referral: Podiatry Visit (i2i)
Due: Procedure / Referral: Foot Screening (i2i)
Due: Lab: HbA1c
Upcoming Items (0)
Tracking
Demographics
External Data
Visits
Appointments
Problems
Allergies
Immunizations
Medications
Date
Procedure
Facility
Provider
1/8/2010 99214 - EST DETAILED VISIT/EXAMEN DETALLADO COMMUNITY HEALTH Of Cali... THOMAS
6/28/2009 99214 - EST DETAILED VISIT/EXAMEN DETALLADO COMMUNITY HEALTH Of Cali... THOMAS
6/21/2009 99212 - EST BRIEF VISIT/VISITA BREVE COMMUNITY HEALTH Of Cali... WILLIS
5/26/2009 MR TRANSFER - MR TRANSFER COMMUNITY HEALTH Of Cali... WALTON
5/5/2009 99213 - EXPANDED LIMITED VISIT COMMUNITY HEALTH Of Cali... WALTON
3/16/2009 MR TRANSFER - MR TRANSFER COMMUNITY HEALTH Of Cali... THOMAS
1/20/2009 99214 - EST DETAILED VISIT/EXAMEN DETALLADO COMMUNITY HEALTH Of Cali... THOMAS
1/14/2009 82948 - FINGERSTICK BLOOD GLUCOSE COMMUNITY HEALTH Of Cali... THOMAS
1/14/2009 99214 - EST DETAILED VISIT/EXAMEN DETALLADO COMMUNITY HEALTH Of Cali... THOMAS
12/4/2008 99214 - EST DETAILED VISIT/EXAMEN DETALLADO COMMUNITY HEALTH Of Cali... THOMAS
11/1/2008 99213 - EXPANDED LIMITED VISIT COMMUNITY HEALTH Of Cali... WILSON
10/31/2008 N/S - NO SHOW FOR TRACKING ONLY COMMUNITY HEALTH Of Cali... MAXWELL
10/29/2008 99213 - EXPANDED LIMITED VISIT COMMUNITY HEALTH Of Cali... BRETT
9/30/2008 99214 - EST DETAILED VISIT/EXAMEN DETALLADO COMMUNITY HEALTH Of Cali... THOMAS
9/29/2008 99214 - EST DETAILED VISIT/EXAMEN DETALLADO COMMUNITY HEALTH Of Cali... THOMAS
9/29/2008 90701 - DTP-VACCINE COMMUNITY HEALTH Of Cali... THOMAS
9/9/2008 99213 - EXPANDED LIMITED VISIT COMMUNITY HEALTH Of Cali... BRETT

NPI on Provider Setup Screen

In the **Provider Setup** screen, there is now a place to enter the NPI (National Provider Identifier) for the provider.

How to Get There:

Setup > Providers > Add or Edit

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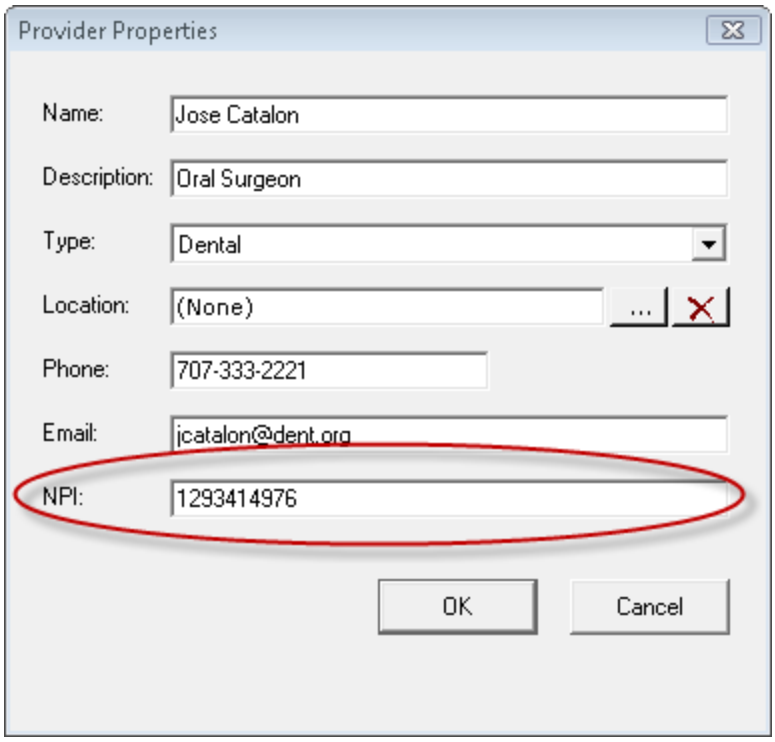
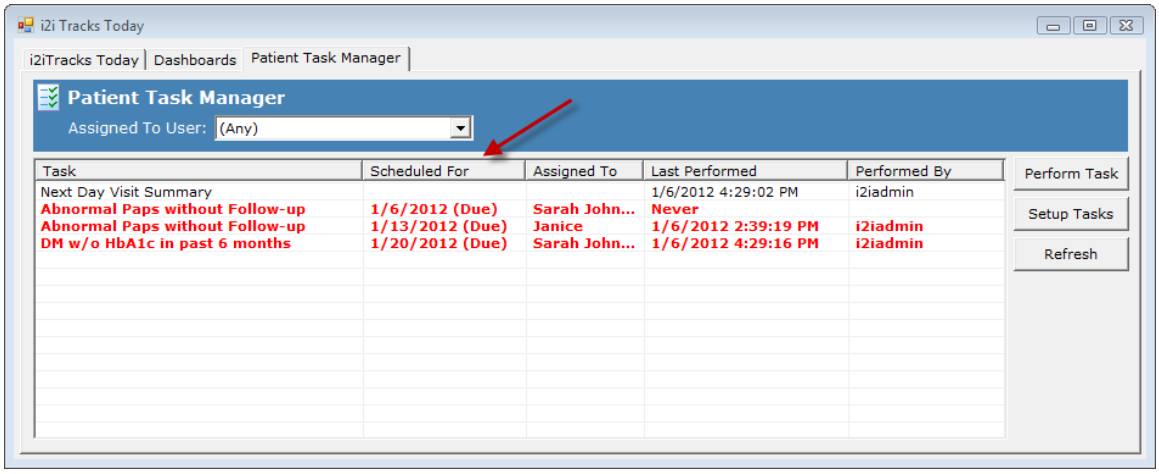


Patient Task Manager Sorting

In the Patient Task Manager, the columns are now sort-able. Click on the column heading to sort the list by that column (sorted by scheduled for date, in the example below).

How to Get There:

Patients > Task Manager



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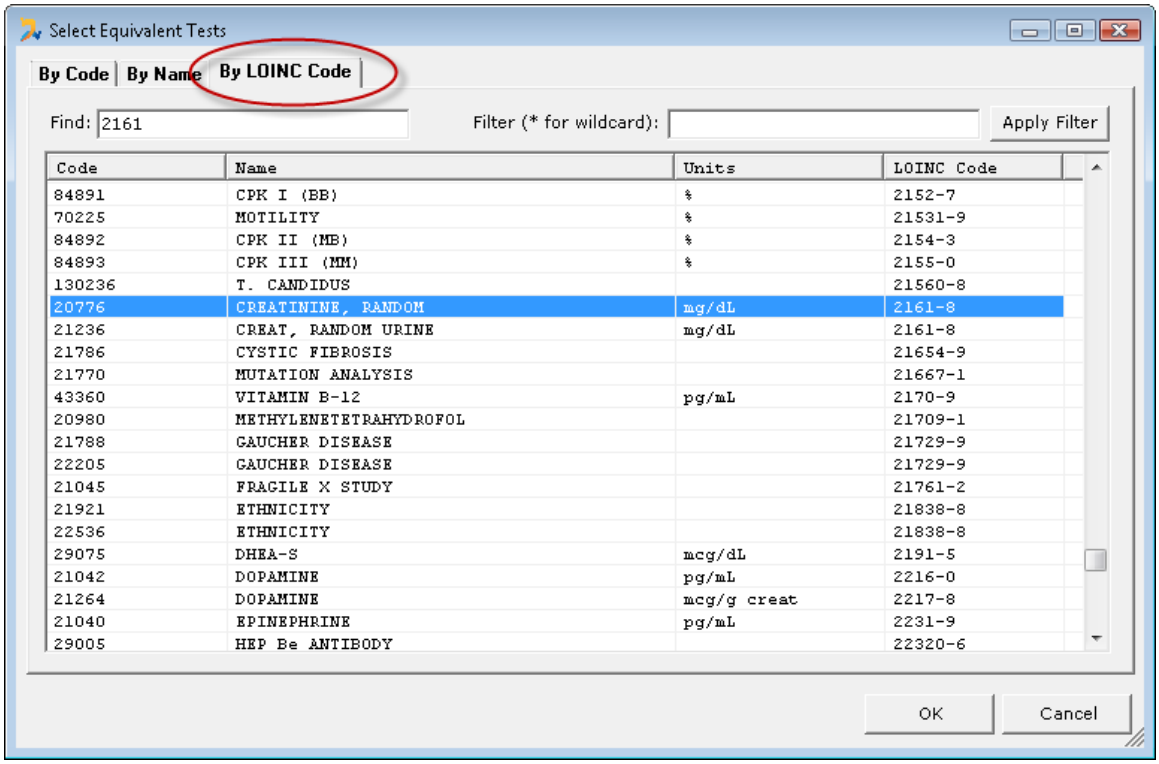
LOINC Support

The LOINC Code in the external lab lookup screen is now displayed when mapping labs to external labs.

How to Get There:

Setup > Tracking > Lab Tracking > Lab Mappings



Follow-Up Manager

In the **Follow-Up Manager** screen, you can now reassign follow-ups from one user to another. A new **Assign To User** button was added for this. You can also use the **Select All** and **Select None** buttons to make selection easier.

How to Get There:

Patients > Manage Follow-Ups > Follow-Ups > Assign to User

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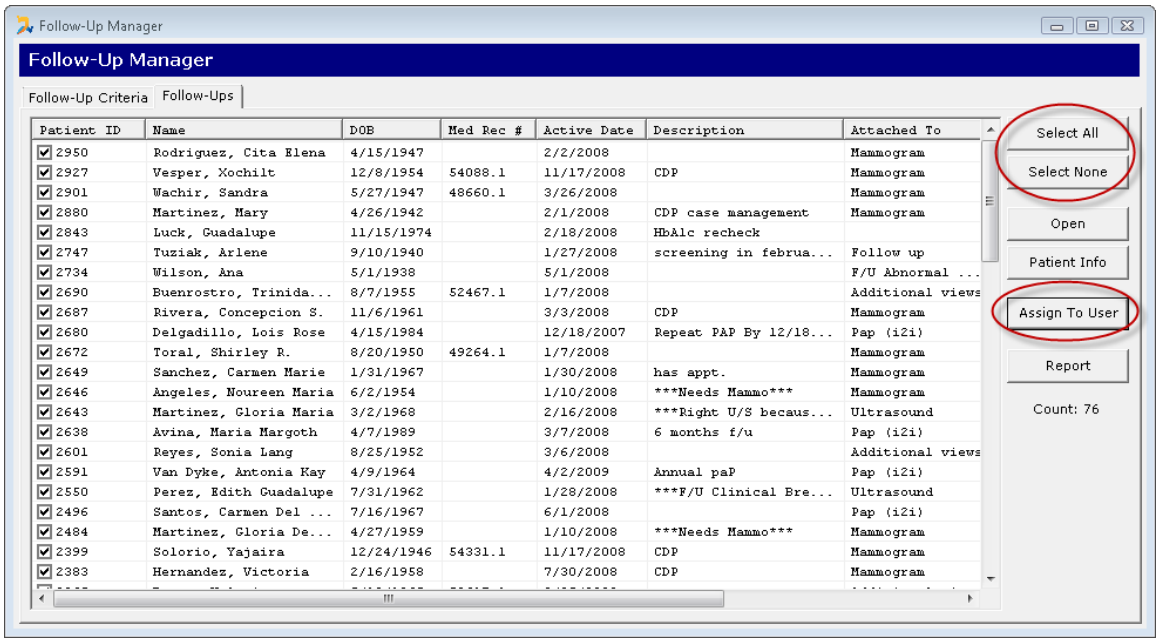
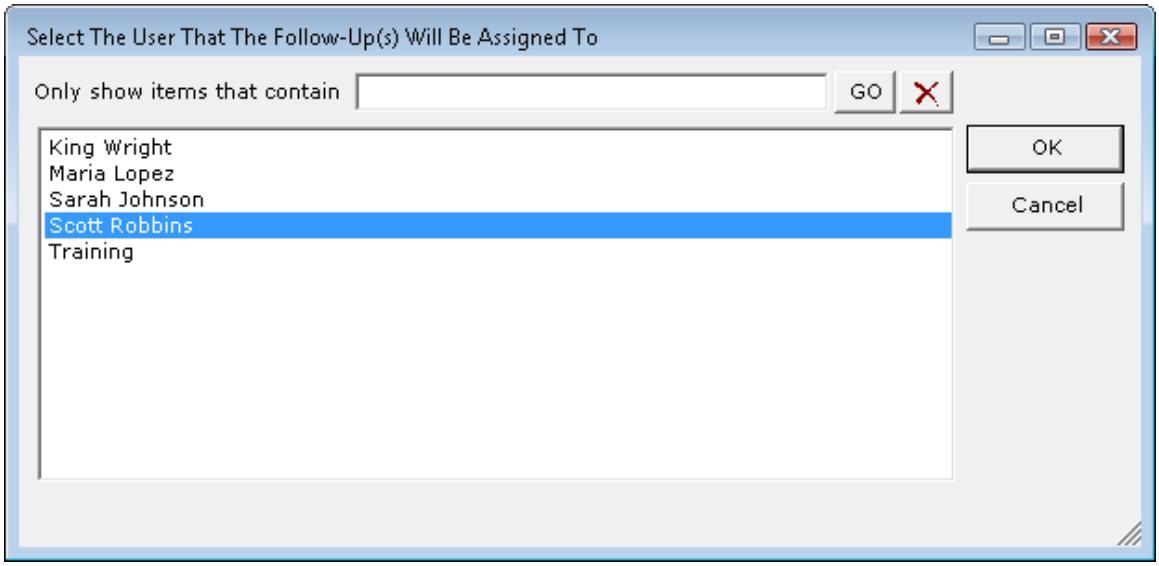

Follow-Up Manager
Follow-Up Manager
Follow-Up Criteria
Follow-Ups
Patient ID | Name | DOB | Med Rec # | Active Date | Description | Attached To
2950 | Rodriguez, Cita Elena | 4/15/1947 | | 2/2/2008 | | Mammogram
2927 | Vesper, Xochilt | 12/8/1954 | 54088.1 | 11/17/2008 | CDP | Mammogram
2901 | Wachir, Sandra | 5/27/1947 | 48660.1 | 3/26/2008 | | Mammogram
2880 | Martinez, Mary | 4/26/1942 | | 2/1/2008 | CDP case management | Mammogram
2843 | Luck, Guadalupe | 11/15/1974 | | 2/18/2008 | HbAlc recheck |
2747 | Tuziak, Arlene | 9/10/1940 | | 1/27/2008 | screening in februa... | Follow up
2734 | Wilson, Ana | 5/1/1938 | | 5/1/2008 | | F/U Abnormal ...
2690 | Buenrostro, Trinida... | 8/7/1955 | 52467.1 | 1/7/2008 | | Additional views
2687 | Rivera, Concepcion S. | 11/6/1961 | | 3/3/2008 | CDP | Mammogram
2680 | Delgadillo, Lois Rose | 4/15/1984 | | 12/18/2007 | Repeat PAP By 12/18... | Pap (i2i)
2672 | Toral, Shirley R. | 8/20/1950 | 49264.1 | 1/7/2008 | | Mammogram
2649 | Sanchez, Carmen Marie | 1/31/1967 | | 1/30/2008 | has appt. | Mammogram
2646 | Angeles, Noureen Maria | 6/2/1954 | | 1/10/2008 | ***Needs Mammo*** | Mammogram
2643 | Martinez, Gloria Maria | 3/2/1968 | | 2/16/2008 | ***Right U/S becaus... | Ultrasound
2638 | Avina, Maria Margoth | 4/7/1989 | | 3/7/2008 | 6 months f/u | Pap (i2i)
2601 | Reyes, Sonia Lang | 8/25/1952 | | 3/6/2008 | | Additional views
2591 | Van Dyke, Antonia Kay | 4/9/1964 | | 4/2/2009 | Annual paP | Pap (i2i)
2550 | Perez, Edith Guadalupe | 7/31/1962 | | 1/28/2008 | ***F/U Clinical Bre... | Ultrasound
2496 | Santos, Carmen Del ... | 7/16/1967 | | 6/1/2008 | | Pap (i2i)
2484 | Martinez, Gloria De... | 4/27/1959 | | 1/10/2008 | ***Needs Mammo*** | Mammogram
2399 | Solorio, Yajaira | 12/24/1946 | 54331.1 | 11/17/2008 | CDP | Mammogram
2383 | Hernandez, Victoria | 2/16/1958 | | 7/30/2008 | CDP | Mammogram
Select All
Select None
Open
Patient Info
Assign To User
Report
Count: 76



Lab Display Order

You now have the ability to specify the order in which labs are displayed in the **Labs\Results** tab of the **Patient Info** screen. A **Lab Display Order Setup** screen was added to specify this order.

- Click **Add** to add labs. Use **Move Up** and **Move Down** to order labs.
- Click **OK** to save.

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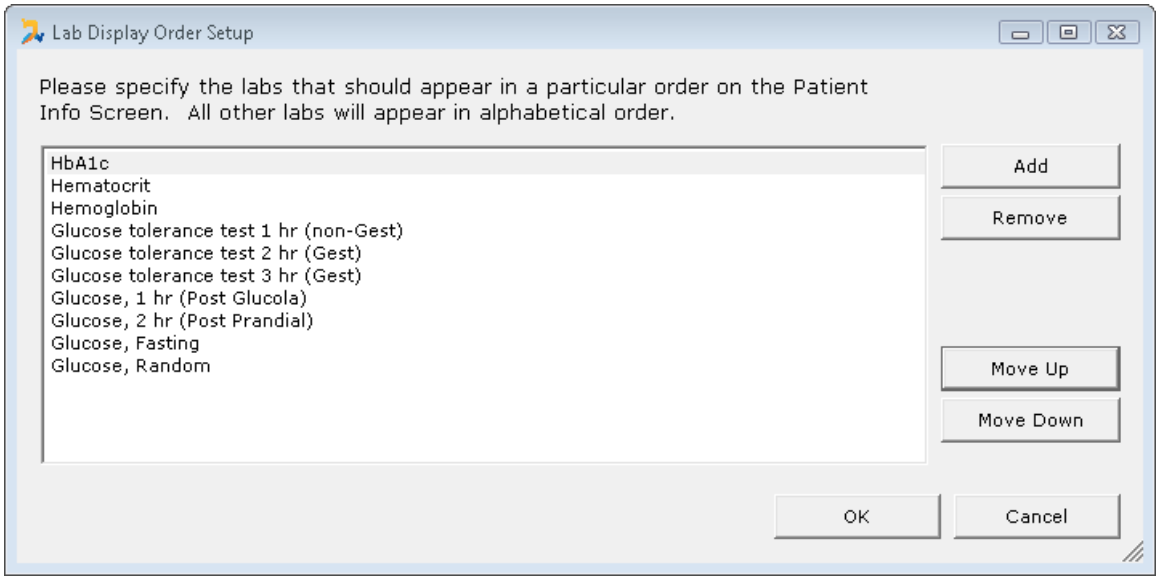
How to Get There:

Setup > Tracking > Lab Tracking > Lab Display Order



Provider Library

In the **Provider** library, you can now add a new provider, even when the external provider library is being used.

You have the option to import and utilize the **Provider** library from the EHR / PMS instead of the i2iTracks provider library. However, now you may continue to add providers to the **Provider** library from within i2iTracks, even when you are using an external provider library.

Gestational Age Calculation

In Perinatal Tracking, the Gestational Age is now calculated based on the Estimated Delivery Date (EDC / EDD) instead of the LMP date.

Gestational Age is calculated and displayed as the difference between the Current Date (or Delivery Date - if delivery indicated on form) and the Estimated Delivery Date less 280 days (or 40 weeks, which is the assumed average Gestational Period).

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Example:

```
Estimated Delivery Date = 11/20/2012

Comparison Date = 06/22/2012 (which is Current Date for this
example)

Pregnancy Start Date = 02/16/2012 (calculated as EDD – 280 days)


Gestational Age = 18 weeks (Difference between Pregnancy Start Date
and Current Date)
```

Setup

- For the calculated Gestational Age value to be displayed on the **Patient Pregnancy** form, you must specify a value for **EDC/EDD (due date by current best estimate**).
- The Form must be configured to display the EDC/EDD value. This is done via the **Setup Perinatal Tracking -> Setup Pregnancy** form.
- If a Delivery Date is indicated on the **Patient Pregnancy** Form (by checking the **Delivery Date** checkbox and selecting a date), this date value will be used instead of the Current Date as Comparison Date when calculating Gestational Age.

How to Get There:

(select patient) > Tracking > Summary > Tracking Types > Perinatal Tracking > (select patient pregnancy) > Open

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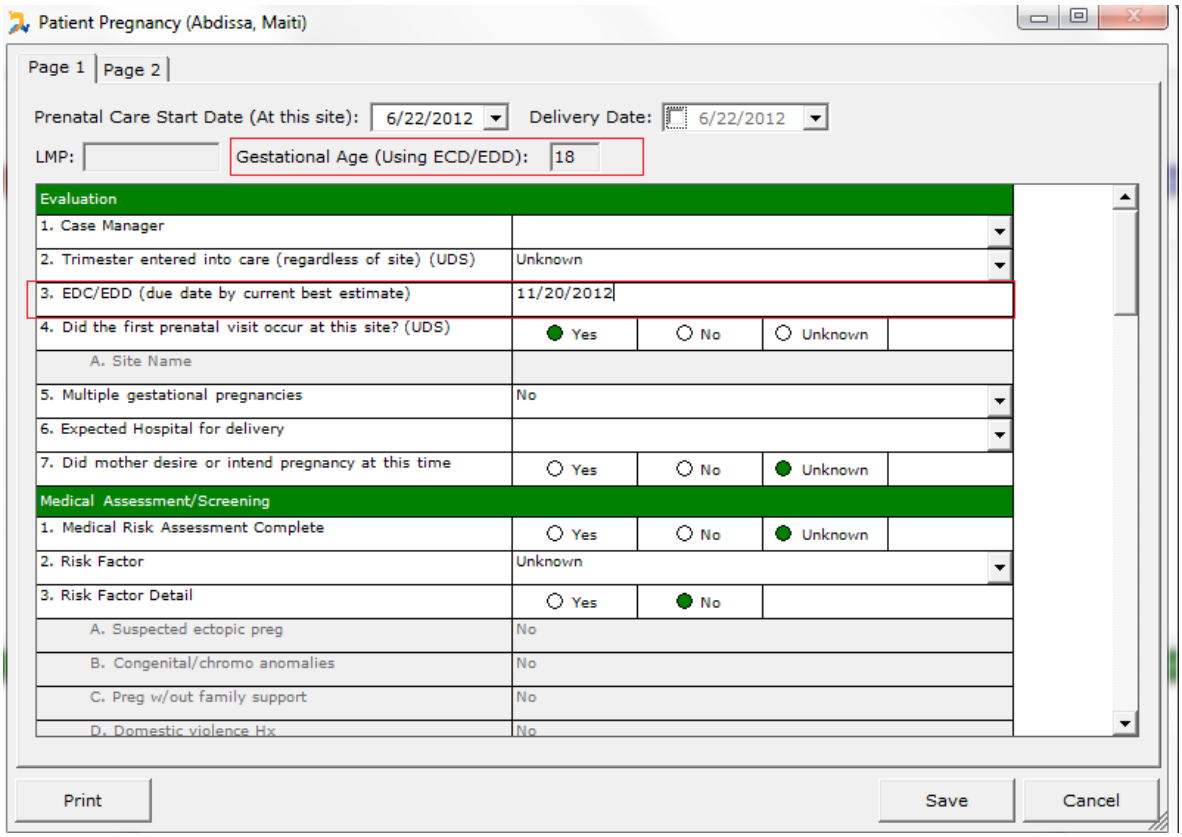

Secondary Provider

You can now indicate a Secondary Provider for a patient. This includes the following enhancements:

- There are now **Patient Search** fields for the **ID** and **Name** of the **Secondary Provider**.
- There is now **Patient Search** filter for **Secondary Provider.**
- A **Include patient's secondary provider** checkbox was added to the **Report Criteria** screen that is displayed when running any patient report. When checked, the report will look at both the Primary and Secondary provider when determining a patient's provider.
- There are now fields for the **Secondary Provider ID** and **Name** in the Custom Report Writer.

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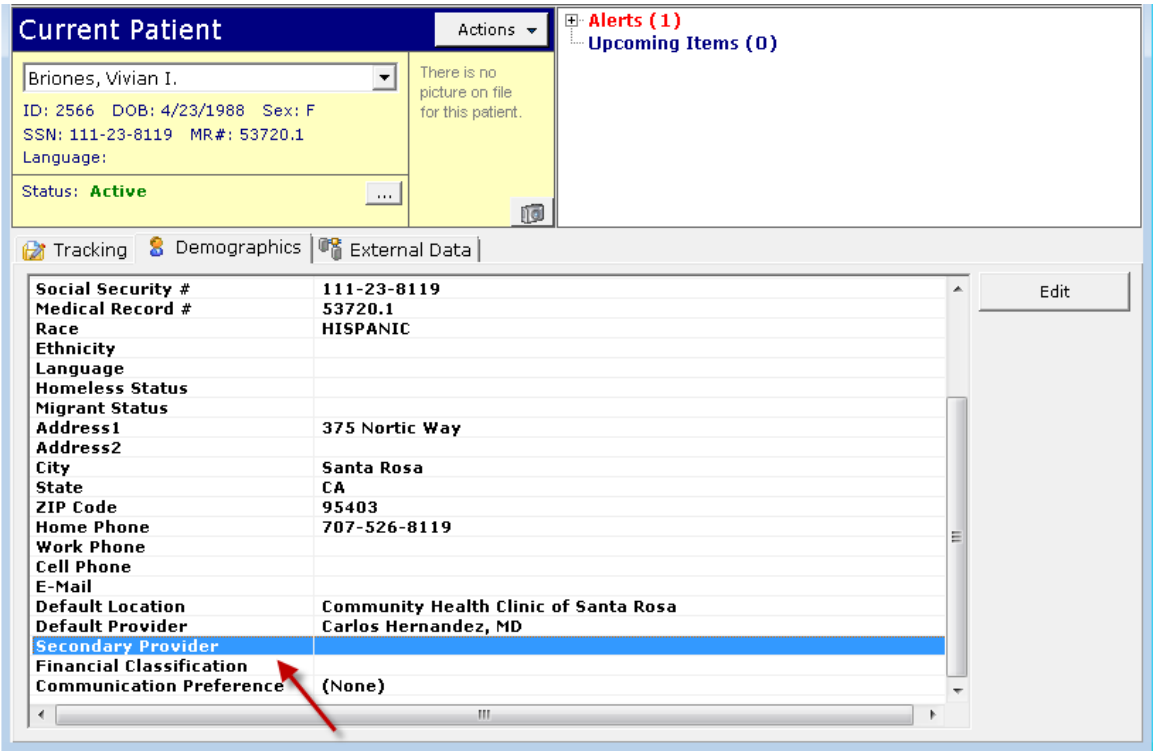
You can now view and edit a patient's Secondary Provider on the **Demographics** tab of the *Patient Info* screen. Double-click **Secondary Provider** to enter provider name.

How to Get There:

(select patient) > Demographics



Cell Phone Support

There is now support for a patient Cell Phone. This includes the following enhancements:

- Added **Cell Phone** as an option when specifying a **Communication Preference** for a patient on the **Demographics** tab of the **Patient Info** screen.
- The patient's **Cell Phone** is now displayed on the **Demographics** tab of the **Patient Info** screen.
- There is now a **Patient Search** field for **Cell Phone**.

How to Get There:

(select patient) > Demographics

- Double click on Cell Phone to display the Other Information window.

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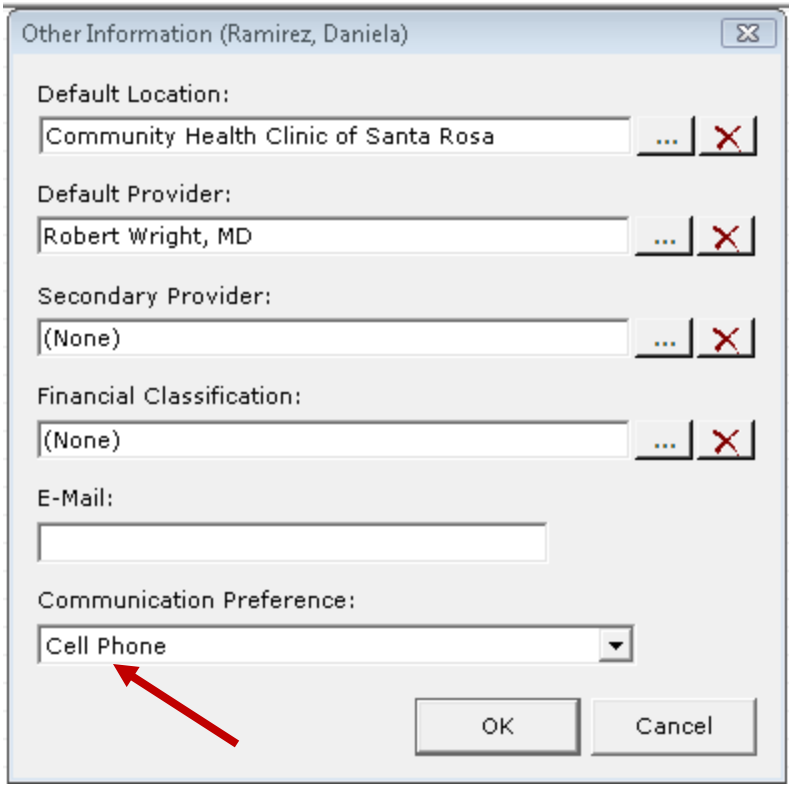

External Appointments Status

There is now a **Status** field for **External Appointments**. This field is populated by the external interface. Possible values are **No Show**, **Completed**, **Canceled**, and **Rescheduled**. Enhancements include:

- In the **Patient Search**, you can now specify a **Status** when searching by appointment.
- Added a **Status** column to the **Past Appointments** list on the **Patient Info** screen.

External Appointments Resource

There is now a **Resource** field for **External Appointments**. This field is populated by the external interface. The Appointment Resource delivers the service to the patient. The following enhancements have been made:

- In the **Patient Search**, you can now specify one or more resources when searching by appointment.

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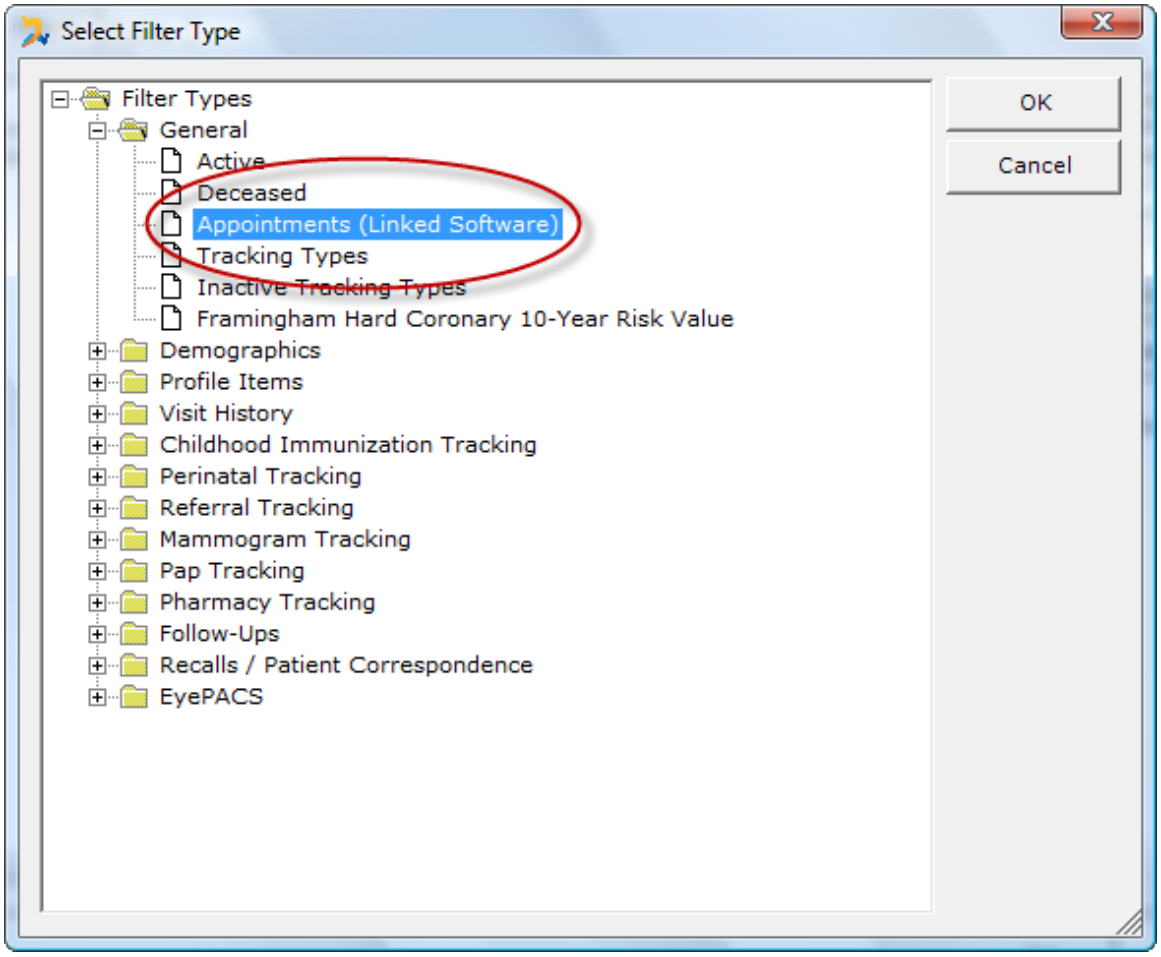
- There is now a Resource column on the **Past** and **Future Appointments** lists on the **Patient Info** screen.

How to Get There:

Patient Search > (select search) Edit > Filters > Add > General > Appointments (Linked Software)



- Click OK. Then click Add.

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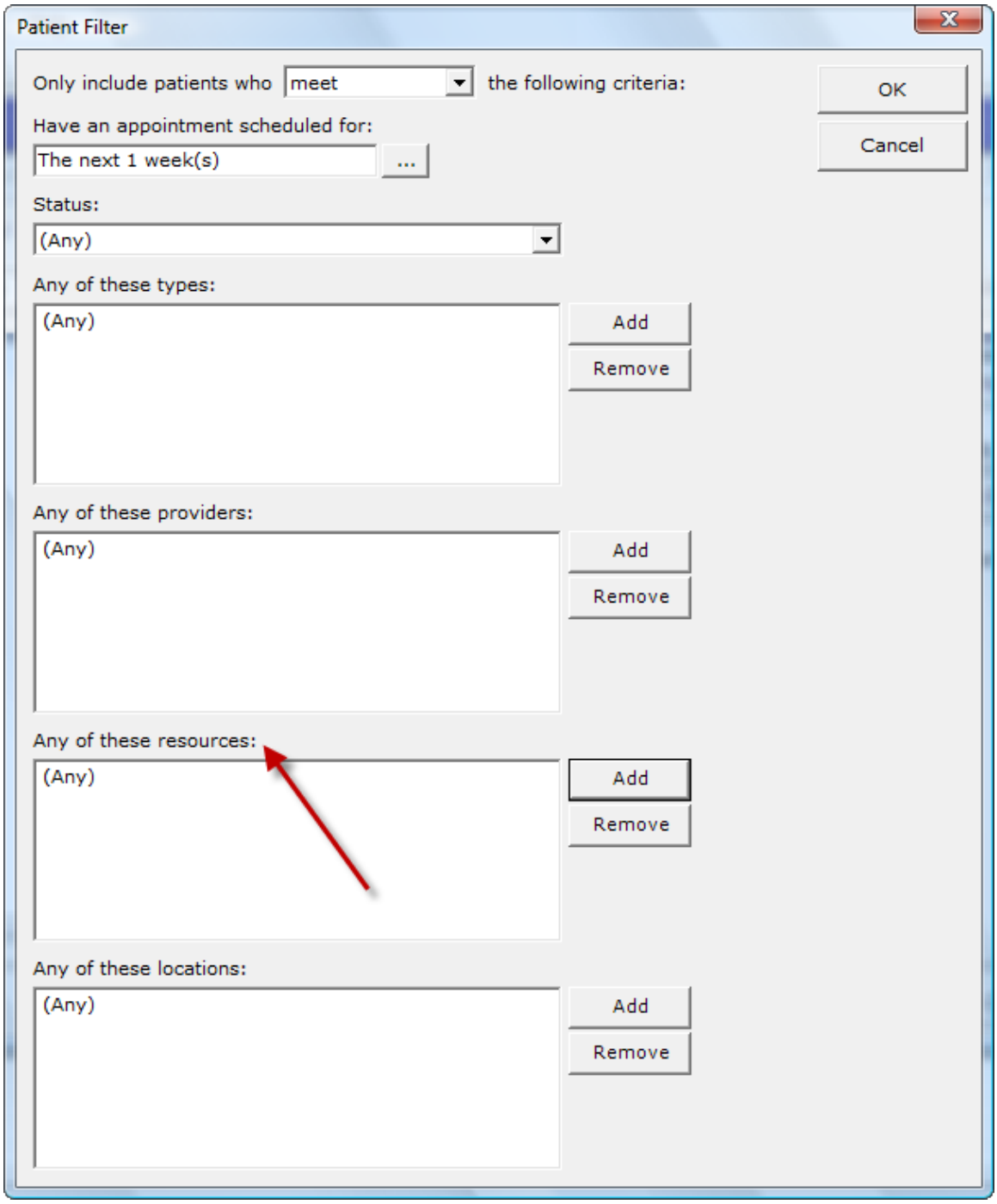

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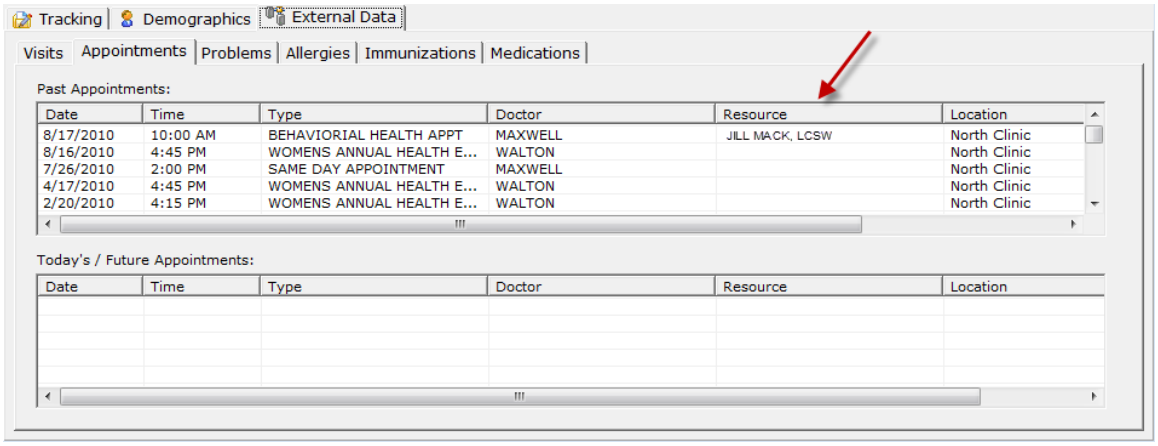
How to Get There:

(selected patient) > External Data > Appointments


Tracking
Demographics
External Data
Visits
Appointments
Problems
Allergies
Immunizations
Medications
Past Appointments:
Date | Time | Type | Doctor | Resource | Location
8/17/2010 | 10:00 AM | BEHAVIORIAL HEALTH APPT | MAXWELL | JILL MACK, LCSW | North Clinic
8/16/2010 | 4:45 PM | WOMENS ANNUAL HEALTH E... | WALTON | | North Clinic
7/26/2010 | 2:00 PM | SAME DAY APPOINTMENT | MAXWELL | | North Clinic
4/17/2010 | 4:45 PM | WOMENS ANNUAL HEALTH E... | WALTON | | North Clinic
2/20/2010 | 4:15 PM | WOMENS ANNUAL HEALTH E... | WALTON | | North Clinic
Today's / Future Appointments:
Date | Time | Type | Doctor | Resource | Location

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